

Ver 2.4



Customer Name : F I R S T S U R N A M E

Customer Lifestage : ☒ Single ☐ Married ☐ Others Customer Income : ☐ <10 Lakhs ☒ 10 Lakhs - 25 Lakhs ☐ > 25 Lakhs

Purpose : ☒ Savings/ Business insurance ☐ Children Solution ☐ Retirement ☐ Protection/Business insurance

Annual premium : (We recommend that the yearly premium amount should not exceed 40% of your annual income.)

Mode of premium payment : ☒ Limited Pay/
Regular Pay ☐ Single Pay

Policy Term (Goal horizon) : ☒ <10 years ☐ 11 years - 20 years ☐ > 20 years (We recommend you to select the policy term to match your goal horizon)

Premium payment term : ☒ <= 10 years ☐ > 10 years (We recommend that the premium payment term should not go beyond 65 years age or your expected earning age.)

Insurance Portfolio held (Sum Assured) :

Aggressive/Growth
 Equity oriented funds

Balanced
 Balanced funds

Conservative/Risk Averse
 Debt oriented funds

*For ICICI Bank channel - Please select risk profile as per ICICI Bank records

Age		Aggressive/Growth	Balanced	Conservative/Risk Averse
Less than 35	Products	Life Time Classic	Life Time Classic	Life Time Classic
		Signature	Signature	Signature
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Guaranteed Pension Plan	Future Perfect	Assured Savings Insurance Plan
		EzyGrow	Guaranteeda Pension Plan	Savings Suraksha
		Protect N Gain	EzyGrow	Future Perfect
		Platinum	Gold	Guaranteed Income For Tomorrow
		Signature Assure	Protect N Gain	GIFT (Long-term)
		Smart Goal Assure	Gold Pension Savings	Guaranteed Pension Plan
		Smart Insurance Plan Plus	Platinum	Sukh Samruddhi
		Wealth Elite Pro	Signature Assure	EzyGrow
		Protect N Gain Whole Life	Smart Goal Assure	GIFT (Long-term) POS
		-	Smart Insurance Plan Plus	Protect N Gain
		-	Wealth Elite Pro	GIFT Pro
		-	Protect N Gain Whole Life	GIFT Pro POS
		-	-	Gold Pension Savings
		-	-	Platinum
		-	-	Signature Assure
		-	-	Smart Goal Assure
		-	-	Gift Select
	-	-	Smart Insurance Plan Plus	
	-	-	Wealth Elite Pro	
	-	-	SmartKid 360	
	-	-	Protect N Gain Whole Life	
	-	-	Gift Assure	
	-	-	Signature Secure	
Solutions**	Signature Capital Guarantee II	Signature Capital Guarantee II	Signature Capital Guarantee II	
	Save 'N' Grow	Save 'N' Grow	Save 'N' Grow	
	Signature Selecte'	Signature Selecte'	Signature Selecte'	
	SmartKid Assure	SmartKid Assure	SmartKid Guarantee	
	Save N Grow Plus Wealth	Save N Grow Plus Wealth	SmartKid Assure	
	Save N Grow Plus Assure	Save N Grow Plus Assure	Save N Grow Plus Wealth	
-	-	Save N Grow Plus Assure		
36 to 50	Products	Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Guaranteed Pension Plan	Future Perfect	Assured Savings Insurance Plan
		Saral Pension	Guaranteed Pension Plan	Savings Suraksha
		Guaranteed Pension Plan Flexi	Saral Pension	Future Perfect
		EzyGrow	Guaranteed Pension Plan Flexi	Guaranteed Income For Tomorrow
		Protect N Gain	EzyGrow	GIFT (Long-term)
		Platinum	Gold	Guaranteed Pension Plan
		Signature Assure	Protect N Gain	Saral Pension
		Smart Goal Assure	Gold Pension Savings	Guaranteed Pension Plan Flexi
		Smart Insurance Plan Plus	Platinum	Sukh Samruddhi
		Wealth Elite Pro	Signature Assure	EzyGrow
		Protect N Gain Whole Life	Smart Goal Assure	GIFT (Long-term) POS
		-	Smart Insurance Plan Plus	Protect N Gain
		-	Wealth Elite Pro	GIFT Pro
		-	Protect N Gain Whole Life	GIFT Pro POS
		-	-	Gold Pension Savings
		-	-	Platinum
		-	-	Signature Assure
		-	-	Smart Goal Assure
		-	-	Gift Select
		-	-	Smart Insurance Plan Plus
		-	-	Wealth Forever
		-	-	Wealth Elite Pro

Age		Aggressive/Growth	Balanced	Conservative/Risk Averse
36 to 50		-	-	SmartKid 360
		-	-	Protect N Gain Whole Life
		-	-	Gift Assure
		-	-	Signature Secure
	Solutions**	Signature Capital Guarantee II	Signature Capital Guarantee II	Signature Capital Guarantee II
		Save 'N' Grow	Save 'N' Grow	Save 'N' Grow
		Signature Selecte'	Signature Selecte'	Signature Selecte'
		SmartKid Assure	SmartKid Assure	SmartKid Guarantee
		Save N Grow Plus Wealth	Save N Grow Plus Wealth	SmartKid Assure
		Save N Grow Plus Assure	Save N Grow Plus Assure	Save N Grow Plus Wealth
		-	-	Save N Grow Plus Assure
51 to 59	Products	Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Pru1 Wealth	Pru1 Wealth	Smart Life
		Guaranteed Pension Plan	Future Perfect	Pru1 Wealth
		Saral Pension	Guaranteed Pension Plan	Assured Savings Insurance Plan
		Guaranteed Pension Plan Flexi	Saral Pension	Savings Suraksha
		EzyGrow	Guaranteed Pension Plan Flexi	Future Perfect
		Protect N Gain	EzyGrow	Guaranteed Pension Plan
		Platinum	Gold	Guaranteed Income For Tomorrow
		Wealth Elite Pro	Protect N Gain	Saral Pension
		-	Gold Pension Savings	GIFT (Long-term)
		-	Platinum	Guaranteed Pension Plan Flexi
		-	Wealth Elite Pro	Sukh Samruddhi
		-	-	EzyGrow
		-	-	GIFT (Long-term) POS
		-	-	Protect N Gain
		-	-	GIFT Pro
		-	-	GIFT Pro POS
		-	-	Gold Pension Savings
		-	-	Platinum
		-	-	Gift Select
		-	-	Wealth Forever
		-	-	Wealth Elite Pro
		-	-	Gift Assure
		-	-	Signature Secure
	Solutions**	Guaranteed Increasing Pension	Guaranteed Increasing Pension	Guaranteed Increasing Pension
		Signature Capital Guarantee II	Signature Capital Guarantee II	Signature Capital Guarantee II
		Save 'N' Grow	Save 'N' Grow	Save 'N' Grow
		Signature Selecte'	Signature Selecte'	Signature Selecte'
		-	-	SmartKid Guarantee
60 and above	Products / Solutions**	Guaranteed Pension Plan	Guaranteed Pension Plan	Guaranteed Pension Plan
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Guaranteed Increasing Pension	Guaranteed Increasing Pension	Guaranteed Increasing Pension
		Saral Pension	Saral Pension	Saral Pension
		Guaranteed Pension Plan Flexi	Guaranteed Pension Plan Flexi	Guaranteed Pension Plan Flexi
		-	-	Wealth Forever
		-	-	Signature Secure

**Solutions are a combination of benefits of two or more individual and separate products as mentioned below
Lakshya-Income and Lakshya-Gold plans are offered under ICICI Life Lakshya

Recommended Products/Solutions for Protection/Protection with Money Back option

iProtect Smart	iProtect Smart ROP	iProtect Super	iProtect Super POS	Wish	iProtect Supreme	iProtect Care
Guaranteed Increasing Pension	Combination of three Guaranteed Pension Plan					
Signature Capital Guarantee II	Signature & GIFT					
Save N Grow	GIFT & EzyGrow					

DECLARATION (PLEASE TICK AS APPLICABLE):

☐ I/We have understood the features of the product and believe it would be suitable for me/our insurance objective. I/We concur that I/we have availed the product after understanding the suitability of the product(s) as per my/our needs. I/We understand that the product(s) and fund(s) recommended to me are based on the information provided by me/us and which is considered suitable in the view and understanding of licensed intermediary and/or ICICI Life. I/We declare that the information provided by me for my risk profiling and recommendation is correct and I/we will not hold licensed intermediary and/or ICICI Life responsible for my acceptance of product(s) and fund(s) recommended.

OR

☐ I/We have gone through the list of product(s) and fund(s) recommended to me based on the risk profiling conducted by the licensed intermediary and/or ICICI Life. I/We wish to supersede the recommendations of licensed intermediary and/or ICICI Life and have opted for the Life Insurance product(s) as highlighted above. I/We agree to purchase the product(s) based on my independent assessment of the risks, merits and suitability of the product(s). I/We will not hold the licensed intermediary and/or ICICI Life responsible for my acceptance of such product(s) and fund(s) as per my/our understanding.

Signature of Prospect / Policyholder	Signature of Agent / Intermediary / Official
Date : D D M M Y Y Y Y	Date : D D M M Y Y Y Y