

Declaration for 'Overseas Pension Transfer

Date: _____

Name of customer: _____

Date of birth: _____

National Insurance number: _____

The amount of transfer: _____

ICICI Life Insurance: _____

Application number: _____

I wish to transfer my funds from my UK Pension scheme _____ to ICICI Life Insurance Limited
(Qualifying recognised overseas pension scheme) for Product _____

I understand and confirm the following:

- Transfer of funds is subject to approval from my current / existing pension scheme manager and/or HMRC (Her Majesty's Revenue and Customs).
- I have made this application after due consideration to the prevalent taxation and social security norms I am solely responsible for any liability arising out of this transfer.
- I understand that the proceeds from cancellation in Free-look period shall only be transferred back to the fund house from where the money was received and hence Free-look request will be processed upon submission of account details of fund house for Free-look pay out transfer.
- To bear the cost of currency conversion at time of policy issuance as well as at time of Free-look/cancellation payout
- To bear the cost for converting the foreign exchange to INR, considering the proceeds are deposited in GBP. I agree and concur that ICICI Life Insurance Limited can issue me the policy out of INR received by them post all expenses / charges levied by the authorised dealer.
- I wish to transfer these funds after having understood the implication, responsibility and requirements to be ensured.
- I am solely responsible for all applicable transactions like freelook, withdrawal, etc undertaken by me. Also, understand any pay-outs made from ICICI Life Insurance, is reportable o HMRC.

Signature of Customer

Note:

The Company may not be aware of all UK tax requirement and HMRC norms pertaining and specific to this case and you have undertaken this transfer after due consideration.