

Surrender Request Checklist for Endowment Policies

Please ensure all the following documents and information are prepared when submitting a surrender request for your endowment policy.

Policyholder Name

Policy Number

Date of Request

- ☐ Original Policy Document
- ☐ Duly filled and signed Surrender Request Form
- ☐ Photocopy of valid ID proof of Policyholder
- ☐ Cancelled cheque / Bank passbook copy (for payout)
- ☐ Photocopy of PAN card (if not submitted earlier)
- ☐ Any other document as required by the insurer

Note: Incomplete documents may result in delay or rejection of your surrender request.

Please consult your insurer for specific requirements if your policy involves assignment, minor policyholder, or is pledged.