

# 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**

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**Policy Number**

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**Date of Request**

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- 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.