

Endowment Insurance Policy Surrender Checklist

Policyholder Details

Name: _____
Policy Number: _____
Contact Number: _____
Email: _____

Required Documents

- Original Policy Document
- Completed Surrender Request Form
- Photo ID Proof of Policyholder (e.g., Passport, National ID)
- Cancelled Cheque / Bank Account Proof
- Recent Passport Size Photograph
- Any Additional Documents as Requested by the Insurer

Policy Surrender Checklist

1. Obtain and fill the surrender request form from the insurer.
2. Attach all required documents as per above list.
3. Verify policy surrender value with the insurance company.
4. Submit documents to the insurer branch or authorized agent.
5. Collect acknowledgment receipt after submission.
6. Wait for communication regarding payout or additional requirements.
7. Receive surrender value in your designated bank account.

Delivery Contact / Branch Details

Branch Name: _____
Contact Person: _____
Phone/Email: _____
Branch Address: _____

For Office Use Only

Document	Received (Y/N)	Remarks
Original Policy Bond	_____	_____
ID Proof	_____	_____
Bank Proof	_____	_____
Photo	_____	_____
Others	_____	_____