PROPOSAL FORM

TRAVEL INSURANCE (BUSINESS AND HOLIDAY)

SBI general INSURANCE
SURAKSHA AUR BHAROSA DONO

Guidelines for completion of the form: Please answer all the questions fully and correctly. Where any question does not apply, please mention clearly that the same is not applicable. Kindly contact SBI General's Offices or Agents for any doubts or clarifications on the proposal form.

Note: The liability of SBI General Company Ltd does not commence until this proposal has been accepted by SBI General and premium paid and upon full realization of the premium payment by the Company, which acceptance shall be specifically intimated to the Proposer by the Company along with the date from which the insurance Cover shall become effective and the insurance cover shall only be effective from the date as intimated by the Company.

FOR OFFICE USE

Quote No.: Inward No.:

Receipt No.: Receipt Date: D D M M Y Y Y Y

INTERMEDIARY'S DETAILS (* Mandatory Fields if Sales Channel Type selected is Banca)

Segment Type: ☐ Corporate ☐ Retail ☐ SME

Business Sector: ☐ Urban ☐ Rural ☐ Social

Business Type: ☐ New ☐ Roll-Over ☐ Renewal

Sales Channel Type: ☐ Agency ☐ Direct

Sales Channel Code: Specified Person's Code*:

Specified Person's Name*:

GSTIN/ISDN: IF APPLICABLE

PROPOSER DETAILS (* Mandatory Fields)

1. Name*: S U R N A M E M I D D L E N A M E F I R S T N A M E

2. Gender*: ☐ Male ☐ Female ☐ Other 3. Date of Birth*: D D M M Y Y Y Y

4. Occupation*: ☐ Salaried ☐ Self Employed / Professional ☐ Business ☐ Student ☐ Retired ☐ Agriculture & allied ☐ Others (specify) _____)

(Please describe fully with nature of duties):

5. E-Mail*: 6. Nationality*:

7. Contact No.*: Mobile No.: Alternate Mobile No.:

8. Aadhaar Card No.: 9. PAN No*.: /Form 97/98.*: (If PAN not available):

10. Passport/Driving License/ Voter ID:

11. Proposer's Permanent Residential Address*:

Pincode:

12. Type of Policy*: ☐ Single Trip Policy ☐ Multi Trip Policy

If Single Trip Policy then: Departure Date: D D M M Y Y Y Y Arrival Date D D M M Y Y Y Y

Policy Duration*: ☐ 7 Days ☐ 14 Days ☐ 21 Days ☐ 28 Days ☐ 45 Days ☐ 90 Days ☐ 180 Days

If Multi Trip Policy then
Proposed period of Insurance: From D D M M Y Y Y Y To D D M M Y Y Y Y Max. duration of Single Trip ☐ 30 Days ☐ 45 Days

Previous Policy No. and Name of Insurer:

13. Sum Insured*:

14. Are You or any of the proposed applicants or close relatives is/are associated to Politically Exposed Person* ? ☐ Yes ☐ No

15. Geography*: ☐ Worldwide ☐ Worldwide excluding USA & Canada

16. Countries of maximum stay*:

The digital copy of your policy document in PDF format will be sent to the registered mobile number or registered email ID
However, if you need a physical copy of the policy document, please send SMS "PRINT <Policy Number>" to 561612 from your registered mobile number.

Disclaimer: SBI General Insurance Company Limited I Corporate & Registered Office: Fulcrum Building, 9th Floor, A & B Wing, Sahar Road, Andheri (East), Mumbai 400 099. For more details on the risk factor, terms and conditions, please refer to the Sales Brochure and Policy Wordings carefully before conducting a sale. I For SBI General Insurance Company Limited IRDAI Reg. No. 144 dated 15/12/2009 | CIN: U66000MH2009PLC190546 | SBI Logo displayed belongs to State Bank of India and used by SBI General Insurance Company Limited under licence. | Travel Insurance (Business and Holiday) UIN: SBITIOP14004V011314 | SBI General Insurance and SBI are separate legal entities and SBI is working as Corporate Agent of the company for sourcing of insurance products.

17. Has any Insurer:

Declined to issue a policy to you?	Yes ☐	No ☐
Declined to continue your Insurance?	Yes ☐	No ☐
Imposed any restriction or special conditions?	Yes ☐	No ☐

(If Yes, please furnish the details) _____

18. Are you or any of the proposed applicant_____, please tick whichever is applicable: Yes ☐ No ☐

HNI ☐ Jeweller ☐ NGO ☐ Film Actor/ Producer ☐ PEP ☐

If yes, please provide details for all person(s) in a separate sheet.

Politically Exposed Persons (PEPs) are individuals who have been entrusted with prominent public functions by a foreign country, including the heads of States or Governments, senior politicians, senior government or judicial or military officers, senior executives of state-owned corporations and important political party officials.

19. Corporate: Yes ☐ No ☐ 20. GSTIN / ISDN: IF APPLICABLE

NOMINEE DETAILS*

Name	Contact Details	Date of Birth	Age	Relationship with primary insured
		D D M M Y Y Y Y		

Where Nominee is a minor, give the details of Appointee

Name of the Appointee	Relationship	Appointee contact details

MEMBERS PROPOSED FOR INSURANCE (* Mandatory Fields)

Details	Name*	Gender*	Date of Birth*	Marital Status*	Relationship with the Proposer*	Occupation*	Nationality* (Indian/ Non-Indian /Non-resident Indian/Other)	Other Insurance* ☐ Yes ☐ No	ABHA (Ayushman Bharat Health Account) number (if available) :
Insured 1									

I/We hereby provide consent to share my/our medical records with the insurer or TPA ☐

If ABHA number is not available, it can be created at www.healthid.ndhm.gov.in

Note: Here Family Includes Self, Spouse, Dependent Children, Dependent Parents & Dependent Parents in law (Maximum up to 6 members can be covered under one policy)

PREVIOUS/EXISTING INSURANCE

Are you applying for portability / Migration: ☐ Yes ☐ No

(If "Yes", please fill the separate portability from also)

Does any person to be insured presently hold any Health Insurance / Critical Illness Insurance Policies with SBIG or any other insurer?

☐ Yes ☐ No If Yes, then provide below details

Previous / Existing Insurance Details	Policy Number	Insurer's Name	Period of Insurance	Sum Insured	Premium Paid (Rs)	Claim Details (if any) Incurred Claim (Outstanding+ Received): Claim Ratio (%):
Insured 1						

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Is/are any of proposed insured suffering from or have they suffered from any of the following (please tick)?

☐ Arthritis, ☐ Allergies, ☐ Circulatory Disorder, ☐ Cancer of any kind, ☐ Diabetes, ☐ Disorders of the Spinal Cord or Vertebral Column like Slipped Disc etc,

☐ Disorders of the Stomach/Large or Small Intestine, ☐ High Blood Pressure, ☐ Heart Condition, ☐ Hernia of any kind, ☐ Hemorrhoids,

☐ Hematological (blood) Disorder, ☐ Mental Condition, ☐ Nervous Disorder, ☐ Fainting Episode, ☐ Blackouts, ☐ Fits, ☐ Paralysis of any kind,

☐ Respiratory Disorder, ☐ Urinary Disorder, ☐ Varicose Veins or any diseases or Injury requiring Surgical or Medical Treatment.

If your answer is 'Yes' to any of the above, please provide details:

Insured Name	Disease(s) Details	Physician Details	
		Name of Doctor	Contact No./Mobile No.

ELECTRONIC INSURANCE ACCOUNT DETAILS SECTION

I want Travel Insurance (business And Holiday) Policy and related information in: ☐ Physical Format ☐ e-Format (electronic); as & when applicable.

Choose your Insurance Repository (For those selecting e-Format)

☐ NSDL Data Management Ltd. ☐ CDSL Insurance Repository Ltd. ☐ Karvy Insurance Repository Ltd ☐ CAMS Repository Services Ltd.

☐ I have an e-Insurance Account & the No. is ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

My CKYC No. (Central Know Your Customer Registry Number) is ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ (If available).

I, _____, hereby grant explicit consent to SBI General Insurance Company for the retrieval and downloading of my CKYC record from the Central KYC Records Registry. I understand that this information is essential for the purpose of ensuring accurate and updated records for insurance services. I acknowledge that SBI General Insurance Company will handle my CKYC information in compliance with all applicable data protection laws and regulations. This consent is valid until revoked in writing by me. I have read and understood the terms and conditions regarding the usage of my CKYC information and voluntarily provide my consent.

Customer Name: _____ Date: D D M M Y Y Y Y

Kindly visit our website www.sbigeneral.in to view the list of KYC OVD (Officially Valid Documents).

PAYMENT DETAILS (Claim/Refund amount will be deposited in this bank account only unless changed subsequently*)

Mode of Payment: ☐ Cheque ☐ DD ☐ Savings Bank Account ☐ Credit Card ☐ Debit Card (*Mandatory fields)

Cheque No./DD No.: ☐☐☐☐☐ Credit/Debit Card No.: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Amount: ☐☐☐☐☐☐☐☐☐☐ Date of Expiry: D D M M Y Y Y Y Date: D D M M Y Y Y Y

Bank Name: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Bank Account No.*: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Branch: _____ IFSC Code*: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

SBIGI does not accept Cash for Premium Payments against the Policy.

AML GUIDELINES (Premium Payment shall be made by the Policyholder of the Policy)

I/We hereby confirm that all premiums have been/ will be paid from bona fide sources and no premiums have been/will be paid out of proceeds of crime related to any of the offence listed in Prevention of Money Laundering Act 2002. I understand that the Company has the right to call for documents to establish source of funds. The Insurance Company has the right to cancel the Insurance Contract in case I am/ have been found guilty by any competent court of law under any statues, directly or indirectly governing the Prevention of Money Laundering in India.

Nationality: Indian ☐ Non-Indian ☐ Non-resident Indian(NRI) ☐ Others ☐

If Non-Indian please specify the nationality and country address_____

If NRI please give details for resident country and address_____

Type of Organisation: (Only applicable if policy issued on Group Basis)

☐ Corporation ☐ Government ☐ Non-Governmental Organisation ☐ Society ☐ Trust

☐ Partnership ☐ International Organisation ☐ Cooperative ☐ Section 25 Companies

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I hereby declare that the current address is different from the avalilable in the Central identities Data Repository. ☐ Yes ☐ No. Customer can submit CKYC form for updation.

Recent photograph of proposer:
(Photograph is required. if customer does not have CKYC ID)

Signature of Proposer :

DECLARATION BY PROPOSER

1. I/We hereby declare on my behalf and on behalf of all the persons proposed to be insured, that the above statements, answers and/ or particulars given by me are true and complete in all respects to the best of my knowledge and that I/We am/are authorised to propose on behalf of these other persons.
2. I understand that the information provided by me will form the basis of the insurance policy, is subject to the Board approved underwriting policy of the insurance company and that the Policy will come into force only after full receipt of the premium chargeable.
3. I/We further declare that I/we will notify in writing any change occurring in the occupation or general health of the life to be insured/ proposer after the proposal has been submitted but before communication of the risk acceptance by the Company.
4. I/We declare and consent to the Company seeking medical information from any doctor or from a Hospital who at anytime has attended on the life to be insured/ proposer or from any past or present employer concerning anything which affects the physical or mental health of the life to be assured/ proposer and seeking information from any insurance company to which an application for insurance on the life to be assured/proposer has been made for the purpose of underwriting the proposal and/ or claim settlement.
5. I/We authorise the Company to share information pertaining to my proposal including the medical records for the sole purpose of proposal underwriting and/or claims settlement and with any Governmental and/ or Regulatory Authority.
6. I/We aware of premium loading, (if any declared above) for habit's as declared/ mentioned by me /us above.
7. I/We hereby declare that the premium paid under this transaction is being paid by me/us through a bank account in my/our name or a Credit/Debit Card or through a Prepaid Payment Instrument (Wallet), held by me/us in my/our name as a account holder and is not a third party payment made by any other person on my/our behalf.

Date: D D M M Y Y Y Y Place:

Signature of Proposer

SECTION 41 OF INSURANCE ACT, 1938

1. No person shall or offer to allow either directly or indirectly as an inducement to any person to take out or renew or continue an Insurance in respect of any kind of risk relating to lives or property in India, any rebate of whole or part of the commission payable or any rebate of the premium shown in the Policy, nor shall any person taking out or renewing or continuing a Policy accept any rebate except such rebate as may be allowed in accordance with the published prospectuses or tables of the Insurer.
2. Any person making default in complying with the provisions of this section shall be punishable with fine, which may extend up to ₹ 10 Lacs.

DECLARATION (If signed in vernacular language / If you have affixed thumb impression above)

Applicable where the Proposer is illiterate or is suffering from a disability due to which writing is restricted or where the Proposer has signed in vernacular language.

(Note: The below must be witnessed by someone other than the Advisor/Employee of the Company).

I/We certify that the product applied for by me/us and the contents of the Proposal Form have been clearly explained to me/us and I/We have fully understood them. I/We further certify that the replies in the Proposal Form have been recorded as per the information provided by me/us.

I, (Full name of the witness) _____ (Relationship with the Proposer) _____ adult and inhabitant of (City) _____and residing at _____ do hereby certify that I/We have read out and explained the contents of the Proposal Form and all other documents incidental to availing the Insurance Policy from SBI General Insurance Company Ltd., to the Proposer/Primary Insured and he/she/they have understood the same. I/We declare that whatever I/We have stated herein above is true and correct to the best of my knowledge and belief.

Date: D D M M Y Y Y Y Place:

Signature of the Witness

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AML Declaration as per AML Master Guideline 2022:

1. Determination of Beneficial Ownership:

I/We hereby confirm that the below mentioned person/s have controlling ownership interest/ exercises control through other means and shall be considered for the purpose of determining Ultimate Beneficial Owner:

Sr. No	Name of Ultimate Beneficial Owner	Percentage (%)*	Remarks, if any

***Notes:**

a) Where the client is a company, the beneficial owner(s) is the natural person(s), who, whether acting alone or together, or through one or more juridical person, has a controlling ownership interest or who exercises control through other means.

1. **"Controlling ownership interest"** means ownership of or entitlement to more than **ten percent of shares or capital or profits of the company;**
2. **"Control"** shall include the right to appoint majority of the directors or to control the management or policy decisions including by virtue of their shareholding or management rights or shareholders agreements or voting agreements;

b) Where the client is a partnership firm, the beneficial owner(s) is the natural person(s), who, whether acting alone or together, or through one or more juridical person, has ownership of/entitlement to more than **Ten percent of capital or profits of the partnership.**

c) Where the client is an unincorporated association or body of individuals, the beneficial owner(s) is the natural person(s), who, whether acting alone or together, or through one or more juridical person, has ownership of or entitlement to more than **fifteen percent of the property or capital or profits of such association or body of individuals.**

d) Where no natural person is identified under (a) or (b) or (c) above, the beneficial owner(s) is the relevant natural person who holds the position of senior managing official.

e) Where the client is a trust, the identification of beneficial owner(s) shall include identification of the author of the trust, the trustee, the beneficiaries with **ten percent or more interest in the trust** and any other natural person exercising ultimate effective control over the trust through a chain of control or ownership.

Date:

Signature of Policyholder:

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