

## Declaration for Beneficial Ownership

Date: DD/MM/YYYY

This declaration is to be submitted in all Employer-Employee, Partnership, Keyman, Trust, and Group Policies

- Name of the Company/Partnership firm/ Unincorporated association or Body of Individuals/Trust \_\_\_\_\_
- Whether the Company is listed in the stock exchange Yes/No \_\_\_\_\_ (If Yes, please refer to Type of Shareholder table)
- Ownership or entitlement is as per the criteria of serial no 1 to 4 mentioned in Type of Shareholder table Yes / No \_\_\_\_\_

This is to certify that the following members hold the percentage of shareholding against their names

Sr No.	Name of the Shareholder	Percentage of Holding	*Type of Shareholder	PAN	** KYC documents submitted		Politically Exposed Person (Yes/No)
					Identity Proof	Address proof	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Name of the Authorised Signatory

SIGN HERE

Signature/thumb impression

\*Individual, Partnership firm, Company, Trust

\*\* KYC documents to be collected if it is an Individual

If you are submitting Aadhaar for KYC, please provide your consent as below

- ☐ I voluntarily consent for Aadhaar based KYC, Aadhaar authentication or offline verification to be done through HDFC Life either now or anytime in future. I am aware that my Aadhaar number, Virtual ID, e-Aadhaar, XML, Masked Aadhaar, face authentication details and/or biometric information, Aadhaar demographic data including my name, address, gender, date of birth and photograph shall be shared by UIDAI with HDFC Life for KYC purposes/due diligence. I confirm that I was provided an option for submitting other acceptable KYC Documents besides Aadhaar. **I confirm that this consent is valid for KYC purposes/due diligence one for issuance/servicing of insurance policy(ies), claim related purposes or for any other regulatory/ statutory related requirements.**

### Note:

To have a uniform approach across the financial sector, the following procedures for determination of Beneficial Ownership as mentioned in Rule 9(3) of PML Rules, 2005 as amended from time to time are prescribed:

Sr No.	Type of Shareholder	Identification of Beneficial Owner
1	Company	Ownership of/entitlement to more than 10% of the capital or profits or shares of the entity
2	Partnership Firm	Ownership of/entitlement to more than 10% of the capital or profits of the entity
3	Unincorporated association or body of individuals	Ownership of/entitlement to more than 15% of the capital or profits of the entity
4	Trust	Settler of the trust/ the trustee/the protector/the beneficiaries with 10% or more interest in the Trust and any other natural person
5	Listed Company	where the client or the owner of the controlling interest is a company listed on a stock exchange or is a subsidiary of such a company, it is not necessary to identify and verify the identity of any shareholder or beneficial owner(s) of such companies

HDFC Life Insurance Company Limited (HDFC Life). CIN: 165110M12000PLC128345 IRDAI Registration No. 101.

Regd. Off: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 011 400.

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