

Proposal Form Unique Reference Number: BAGIC/ Health/ Group/ 00								
For Office Use Only :			For Agent Use Only :					
Scrutiny No.	Receipt No.	Policy No.	Loan Account Number	Emp/LG Code	IMD Code	Sub IMD Code	IMD Name	Mobile No.

## HEALTH GUARD (GROUP): PROPOSAL FORM

Instructions for filling up the FORM:

1. Please answer all questions in BLOCK letters.
2. The Liability of the Company does not commence until this Proposal has been accepted by the Company and premium has been paid.
3. This Proposal will be the basis of any subsequent policy that the Company issues to you. It is therefore essential that you provide all the information in this Proposal FULLY AND ACCURATELY and that you provide the Company with any and all additional information relevant to risk to be insured or its decision as to acceptance of the risk or the terms upon which it should be accepted.

1. Name of the Proposer (in full)

[illegible]

2. PAN/TAN no.

[illegible]

- ### 3. Address

[illegible][illegible][illegible]

- #### 4. Description of the Proposer's Business

[illegible]

5. Please mention detail of the Group/ Association/ Institution/ Corporate Body whose members are being covered under the Policy?

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6. Please state whether all eligible members of the Group/ Association/ Institution/ Corporate Body are proposed for Insurance? ☐ YES ☐ NO

7. Please mention the Total number of persons to be covered: \_\_\_\_\_  
(Please attach the list of persons to be covered as per the format attached in Annexure I)

8. Do you wish to opt for Voluntary Co-payment? ☐ YES ☐ NO

If Yes, please provide Co-payment %      ☐ 10% ☐ 20%

9. Have you provided complete details of members in Annexure I? ☐ YES ☐ NO

10. Plan opted ☐ Silver ☐ Gold

11. Type of Policy Sum Insured ☐ Individual Sum Insured ☐ Family Floater Sum Insured

12. Premium Payment Zone\* ☐ Zone A ☐ Zone B

\* There are Two Zones for Premium payment

Zone A- "Following cities has been clubbed in Zone A:-

Delhi / NCR, Mumbai including (Navi Mumbai, Thane and Kalyan), Hyderabad and Secunderabad, Bangalore, Kolkata, Ahmedabad, Vadodara and Surat.

Zone B

Rest of India apart from Zone A cities are classified as Zone B.

Note:-

Policyholders paying Zone A premium rates can avail treatment all over India without any co-payment.

But, those, who pay zone B premium rates and avail treatment in Zone A city will have to pay 20% co-payment on admissible claim amount. This Co – payment will not be applicable for Accidental Hospitalization cases.”

Policyholder residing in Zone B can choose to pay premium for Zone A and avail treatment all over India without any co-payment.

Annexure I

LIST OF PERSONS PROPOSED FOR INSURANCE												
Sr. No.	Name of the Insured	Employee Code/ Account No (if Applicable)	Relationship of the Dependent members to the Employee/ Member	Date of Birth (DD-MM-YYYY)	Gender	Height (cms)	Weight (kgs)	Sum Insured (Individual)	Sum Insured (Floater)	Nominee	Nominee Relationship with Insured	Pre - Existing Disease (if any)
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												

\*Please attach additional sheets, if space not sufficient to complete details.

Non-Medical Expenses Cover (Rider) ☐ Yes ☐ No

Note- This rider can be availed with Sum Insured options of INR 5,00,000 and above on payment of extra premium

Health Prime Ride(Group)

☐ Individual ☐ Floater Plan Option \_\_\_\_\_

13. Do you smoke cigarettes or consume tobacco (chewing paste) / alcohol, nicotine or marijuana in any form? Please give duration and daily consumption? \_\_\_\_\_
14. Has any proposal for life, critical illness or health related insurance on your life or lives ever been postponed, declined or accepted on special terms? If yes, give details \_\_\_\_\_
15. Has any of the persons to be insured suffer from/or investigated for any of the following? Disorder of the heart, or circulatory system, chest pain, high blood pressure, stroke, asthma any respiratory conditions, cancer tumor lump of any kind, diabetes, hepatitis, disorder of urinary tract or kidneys, blood disorder, any mental or psychiatric conditions, any disease of brain or nervous system, fits (epilepsy) slipped disc, backache, any congenital/ birth defects/ urinary diseases, AIDS or positive HIV. ☐ YES ☐ NO
16. Have you or any of the persons proposed to be insured were/are detected as Covid positive? ☐ YES ☐ NO
17. Do you or any of the family members to be covered have/had any health complaints/met with any accident in the past 4 years and prior to 4 years and have been taking treatment, regular medication (self/ prescribed) or planned for any treatment / surgery / hospitalization? (Please provide details in the table given below) ☐ YES ☐ NO  
If the reply is YES for question 15 to 17 please share details in below table

Member Name	Name of the Illness/injury suffered / suffering in the past	Treatment details	Date first treated	Current Status	Vaccinated against COVID-19? (Yes/No)

18. Have any of your immediate family members (father, mother, brother or sister) have/ had diabetes, hypertension, cancer, heart attack, or stroke and at what age? ☐ YES ☐ NO  
If yes, was it before age 60 years or after 60 years?

Member Name	Relationship with Proposer	Disease Name	At what Age illness suffered

19. Payment Details ☐ Cash ☐ Cheque ☐ DD ☐ Credit Card ☐ Debit Card

Amount	Transaction No.	Transaction Date	Bank Name	Branch

## DECLARATION

I/ We hereby declare, on my behalf and on behalf of all 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 authorized to propose on behalf of these other persons.

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.

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.

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.

I/We authorize 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.

Proposed Policy Period: From: \_\_\_\_/\_\_\_\_/\_\_\_\_ To : \_\_\_\_/\_\_\_\_/\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Place \_\_\_\_\_

Signature of the Proposer

## INSURANCE ACT 1938 SECTION 41- Prohibition of Rebates

No person shall allow 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 the whole or part of the commission payable or any rebate of the premium shown on the policy, nor shall any person taking out or renewing a policy accept any rebate, except such rebate as may be allowed in accordance with the published prospectus or tables of the insurer. Any person making default in complying with the provisions of this section shall be liable for a penalty which may extend to ten lakh rupees.

## ACKNOWLEDGEMENT:

Received from Ms. / Mrs. / Mr: \_\_\_\_\_  
sum of Rs. \_\_\_\_\_ through Cash# / Cheque / DD / Credit Card / Debit Card No. \_\_\_\_\_ against your proposal for Health Policy.  
Signature of Bajaj Allianz Official/ Intermediary: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_ Place: \_\_\_\_\_  
Bajaj Allianz Official / Intermediary Name: \_\_\_\_\_  
Note: Neither the submission of a completed proposal for insurance or any payment for any policy sought oblige the Company to agree to issue a policy, which decision is and always shall be in the Company's sole and absolute discretion

**DECLARATIONS – PHYSICAL PROPOSAL FORM**

- Are you or any of the proposal applicants a PEP\* or a close relative of PEP\*?

If yes, please share the details \_\_\_\_\_

“Politically Exposed Persons” (PEPs) are individuals who are or have been entrusted with prominent public functions in a foreign country, e.g., Heads of States/Governments, senior politicians, senior government/juridical /military officers, senior executives of state-owned corporations, important political party officials, etc.” ☐ Yes / ☐ No

- I/we hereby give my/our consent to the Company to verify and obtain my/our identity/address proof through Central KYC Registry or Goods and Service Tax Portal or Ministry Of Corporate Affairs Portal or National Securities Depository Limited portal for the purpose of undertaking KYC. ☐ Yes / ☐ No

- I/we hereby agree and ensure to maintain details of all the beneficiaries covered under the policy and shall share the same with the Company as and when required. ☐ Yes / ☐ No

- I/We hereby give voluntary consent to BAGIC/Company to share my/our personal information and data provided in this proposal form with its group companies or any other person in connection with the Insurance Policy or otherwise, including for providing products and services of group companies that may be of interest to me/us, to be used in accordance with their respective privacy policies and subject to appropriate measures being in place to safeguard my/our personal information. ☐ Yes / ☐ No