

**DECLARATION BY THE LIFE ADVISOR**  
(Applicable for PHF submitted through Recruitment Application only)

I request you to accept the Personal History Form ("PHF") Reference Number DC500794 submitted by me on recruitment application of Kotak Mahindra Life Insurance Company Ltd. ("KLI") during my meeting with OM75006 of KLI.

Mr/Mrs./Ms Jayesh Jani ("Recruiter").  
 1. I Jayalaxmi Hemant Barot hereby declare that none of my relatives as defined in the IRDAI Circular Ref No. IRDAI/Life/GDL/ GLD/217/09/2011 dated September 20, 2011, are employed with Kotak Life Insurance (hereafter referred to as "the Company") as on this date.  
 2. Further, I also undertake to inform the Company if any of my relatives join as an employee with the Company in future and I fully understand that the Company reserves the right to terminate my services as a life advisor /agent of the Company on the happening of such an event. Relatives shall include spouse, dependent children or dependent step-children whether or not residing with me.  
 3. I further declare that the following of my relatives are employed with Kotak Mahindra Life Insurance Company Ltd.  is Partner Banks / Corporate Agencies / Brokers:  
 Name of Relative: \_\_\_\_\_ He / She is my \_\_\_\_\_ (relationship) Name of Partner Bank / Channel Partner of the Company: \_\_\_\_\_

4. I also undertake to indemnify the Company for any losses, damages, charges, penalties borne or to be borne or incurred by the Company if the above referred information provided by me is found to be incorrect.
5. I also undertake to pay to the Company the fee prescribed by the Company for the purpose of training/examination. I also understand that the fee once paid shall not be refunded in any circumstances.
6. I also understand that I shall not be entitled to any remuneration or stipend during the training period.
7. I also undertake that in case I do not receive the original Appointment letter and ID Card for POSP/Agent, I shall intimate the company in writing within 45 days from the date of passing the POSP/Agent examination. I also understand that Appointment letter and ID card shall be deemed to be duly delivered and received by me if no such written intimation is received by the Company within such period of 45 days.
8. I hereby declare that particulars given above are correct and I express willingness to receive credit of commission in the Bank Account indicated in this Form. If transaction is delayed, lost or otherwise affected for any reason whatsoever, including for the reason of incomplete or incorrect information provided by me, I would not hold the Company or its officials responsible. I shall also intimate the Company of any change in my Bank Account details. I also understand that my candidature for appointment as a POSP/Agent shall be considered/ processed only after my passing the said examination and my submitting all the required documents with the Company.
9. In case I have applied for becoming an agent but do not qualify to become an Agent of the company, I give authority to the Company to appoint me as a Point of Sale Person with the above furnished information on completion of the required number of POSP training hours and acquiring qualifying marks in the POSP examination conducted by the company.
10. In case, after appointment as Point of Sale Person, I also qualify to become an Agent of the company, I give authority to the Company to appoint me as an Agent with the above furnished information on completion of required number of hours of Agent training and acquiring qualifying marks in the IRDAI Agent Recruitment exam conducted by IIR/NSEIT.
11. I acknowledge that the Company reserves full right to withdraw my nomination for the training/exam at any point of time, if my progress is found to be unsatisfactory. In case of discontinuation from my side, during the training period, without any significant reason, I will have to return the study kit supplied by the Company at the time of training.
12. I hereby voluntarily submit to KLI a copy of Aadhaar card, as issued by UIDAI, for the purpose of establishing my identity.
13. I hereby give my consent to KLI to verify my Aadhaar to establish its genuineness through Quick Response (QR) code (embedded in the Aadhaar card), e-verification or through other such acceptable manner as per UIDAI guidelines or under any Act or law from time to time.
14. I hereby expressly declare that I have been informed by KLI that: 1) My Aadhaar details will be used for KYC (Know Your Customer) purposes in connection with my application for becoming an Agent of KLI and shall not be used for any other purpose, unless the same is required under any law. 2) During offline verification process, my information such as Name, Age, Gender and address may be verified by KLI. 3) I understand that I may submit any other officially valid identity document in place of Aadhaar.
15. Think Green: Say No to paper statement by giving consent below: Please tick this box to receive soft copy of commission instead of hard copy
16. WhatsApp disclaimer: By submitting my details, I override my National Do Not Call Registry (NDNC) registration and authorize the Company and/or its representatives to contact me through call, WhatsApp or E-mail.
17. I further provide my consent to the Company to share my information on confidential basis with any of the Company's  vendors and/or representatives for evaluating and processing my PHF and application
18. I accept all the Terms and Conditions including applicable Annexures and I undertake to comply with the same in letter and spirit subject to the acceptance of my PHF application by the Company. I also hereby declare that a copy of these terms and conditions (Terms and Conditions are available [on](#) has been made available to me by Company's representative.

ORIGINAL SEEN AND VERIFIED: Photograph of my/four below mentioned original documents have been taken and uploaded on the Recruitment Application in my presence by the recruiter above named: Proof of Identity

<p><b>Proof of Residence</b></p> <p><b>Education Proof</b></p> <p>Name, code of Recruiter</p> <div style="border: 1px solid black; padding: 2px; min-height: 20px;">                 Jayesh Jani, OM75006             </div>	<p><b>Proof of Age</b></p> <p><b>Agent Terms and Conditions</b></p>	<p><b>Bank document(s) -</b></p> <p><b>Aadhaar Card</b></p> <p>Seen and Verified the original Documents (Name, code of Authorized KLI employee)</p> <div style="border: 1px solid black; padding: 2px; min-height: 20px;">                 Mathur Parul, OM7006             </div>	<p><b>PAN Card</b></p>
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Place : Mumbai Date : 08/07/2020 Mobile No : 9987030028