



Customer Portal

Update Personal Profile &
Switching Fund



MAX LIFE INSURANCE
Industry - Banking Financial Services & Insurance
Research by - White Page International

How to Login to the Customer Portal

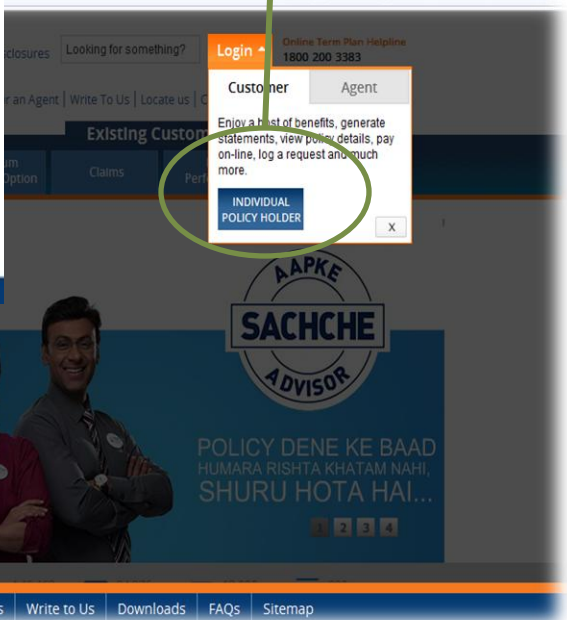
✓ Log in to www.maxlifeinsurance.com



1 Click on Login



2 Select Individual Policyholder



AAPKE SACHCHE ADVISOR
POLICY DENE KE BAAD
HUMARA RISHTA KHATAM NAHI,
SHURU HOTA HAI...



- Home
- About Us
- Products
- Fund Performance
- Process Information
- Premium Payment Options
- Work With Us
- Contact Us
- Agent Speaks
- Grievance Redressal Policy

2/08/2017

Registered User

Username or Client ID*:

Password:

To Generate Consolidated Premium Receipt,
Please [Click here](#)

- New user? [Register here](#)
- Forgot Username/Password? [Click here](#)
- User Guide [Click here](#)

*Your Max Life Insurance Client ID is your Login ID.

Site best viewed in 1024x768 resolution with Internet Explorer 8.0, 9.0, 10.0, 11.0, Google Chrome, Firefox & Safari.

Contact us	NAVs	Tools & Calcs
Call Toll Free: 1800 180 5577 (BSNL/MTNL) or 1800 200 5577		
Email Us: service.helodesk@maxlifeinsurance.com		
SMS: "QUERY" to 5424243 "Life" to 54242		
Branch Locator		
Write to My Servicing Agent		

Enter your customer ID and password to log -in

- ✓ Post entering the login details, homepage of the portal opens. Click on various links to experience host of feature / services for your policy



Registration Number: 104
Last Log On:
22/08/2017
Log Off

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Grievance Redressal Policy

22/08/2017

- Personal Profile ▾
 - My Profile
 - Update Contact Information
- Policies ▸
- Service Requests ▸
- Payment History ▸
- E-Statements ▸
- Downloads ▸
- Mailbox ▸
- Transact Online ▸
- Subscribe/Unsubscribe ▸

Welcome CHARU MAHESHWARI!

[Click Here](#) to create your own username to login to the Customer portal.

For self service options on Max Life Insurance toll free please [Click Here](#)

To Generate Consolidated Premium Receipt, Please [Click Here](#)

Open Electronic Insurance Account at no cost—the simpler way to manage your life insurance policies. To know more, [Click Here](#)

Messages from Max Life Insurance

Policy Number	Description
	Effective May 01, 2009, in accordance with the Finance Act 1994, Service Tax is applicable on the life and health insurance premium.
	Levy of "Late Payment Fee" on Traditional Policies: Effective 1st April, 2012, Late Payment charges will be levied on all renewal premium payments which are made after Grace Period. Late Payment Fee on Traditional Plans will be calculated as follows Due Date +30 days is Nil, 31-60 days from due date is Rs. 100/-, 61-180 days from due date is Rs. 250/-, More than 180 days from due date is Rs. 250 + 8% p.a on the renewal premium.

Messages (1 - 2 of 2)

Inbox (No Unread Mails)

Contact us NAVs Tools & Calcs

Call Toll Free:
 1800 180 5577
 (BSNL/MTNL)
 or
 1800 200 5577
Email Us :
service.helpdesk@maxlifeinsurance.com
SMS :
 "QUERY" to 5424243
 "Life" to 54242
[Branch Locator](#)
[Write to My Servicing Agent](#)

How to update your Personal Profile

✓ Follow the steps mentioned below to update your email id/ Mobile no.

The screenshot shows the 'My Profile' page on the Max Life Insurance website. The page is divided into several sections:

- Navigation Bar:** Home, About Us, Products, Fund Performance, Process Information, Premium Payment Options, Work With Us, Contact Us, Agent Speaks, Grievance Redressal Policy.
- Left Sidebar:** 28/08/2017, Personal Profile (with a dropdown arrow), My Profile, Update Contact Information, Policies, Service Requests, Payment History, E-Statements, Downloads, Mailbox, Transact Online, Subscribe/Unsubscribe.
- Main Content Area:**
 - Personal Profile:** Policy Holder Name: Bhaskar Trivedi, Date of Birth: 20/07/1990, Current Address: abcd vijay nagar New Delhi 110001, Permanent Address: abcd vijay nagar New Delhi 110001, Work Address: Not Available N/A INDIA.
 - Policy Owner Contact Details:** Mobile Number: 9999999999, Landline Number: --, Email: abcd@gmail.com.
 - Update Email ID and Mobile Number:** A form with input fields for Email (abcd@gmail.com) and Mobile (9999999999).
- Right Sidebar:**
 - Inbox:** (No Unread Mails)
 - Contact us:** Call Toll Free: 1800 180 5577 (BSNL/MTNL) or 1800 200 5577. Email Us: service.helpdesk@maxlifeinsurance.com. SMS: "QUERY" to 5424243, "Life" to 54242. Branch Locator, Write to My Servicing Agent.
- Bottom Bar:** Change Password, Confirm Updatons, Cancel.
- Footer:** A Max Financial Services and MS Joint Venture. FAQ | Sitemap | Terms and Conditions | Do not Disturb | Privacy Policy | IRDAI Public Notice on Spurious Calls | Disclaimer | Life Insurance | Insurance Ombudsman. Copyright © 2008 Max Life insurance Co. Ltd. All Rights Reserved. An ISO 9001:2008 Certified Company. Registered Office: 419, Bhai M...h Nagar, Railmajra, Tehsil Balachaur, District... Square Building, Jacaranda Marq, DLF City Phase II, Nawanshahr, Punjab -144 533. An ISO 9001:2008 Certified Company. Corporate Office: Max Life Insurance Co. Ltd., 3rd, 11th and 12th...

Annotations:

- 1:** A yellow circle with the number '1' is placed over the 'Mobile Number' field in the 'Policy Owner Contact Details' section.
- 2:** A yellow circle with the number '2' is placed over the 'Confirm Updatons' button in the bottom bar.
- Green Arrows:**
 - One points from the 'My Profile' dropdown menu to the 'Personal Profile' section header.
 - Another points from the 'Update Email ID and Mobile Number' form to the 'Confirm Updatons' button.
- Text:**
 - 'Click on "My Profile"' is written in green above the first arrow.
 - 'Fill Details' is written in green above the 'Email' field in the update form.
 - 'Click on "Confirm Updatons"' is written in green above the second arrow.

Post entering the details. Click on "Confirm Updatation" to get the same updated

How to update your Contact Information

✓ Follow the steps mentioned below to update contact details



Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Grievance Redressal Policy

29/08/2017

Personal Profile

- My Profile
- Update Contact Information
- Folicies
- Service Requests
- Payment History
- E-Statements
- Downloads
- Mailbox
- Transact Online
- Subscribe/Unsubscribe

1 Click Here

2 Fill Details

3 Press "Submit"

Update Permanent Address

Address Line1:

Address Line2:

Address Line3:

City:

State:

PinCode:

Country:

Update Current Address

Address Line1:

Address Line2:

Address Line3:

City:

State:

PinCode:

Country:

Update Office Address

Address Line1:

Address Line2:

Address Line3:

City:

State:

PinCode:

Country:

Change landline Number

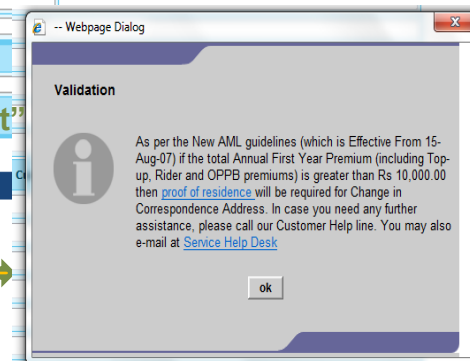
Landline Number:

Disclaimer

a) International number are not accepted.

Submit Reset

Pop-up message for Premium > 10k



Please Note: For updation of address for total annual first year premium greater than 10,000.00, we would require proof of residence for change in Correspondence Address. For further assistance, please call Customer helpline number

How to switch funds online

✓ Follow the steps mentioned below to switch funds online

22/11/2013

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Log Off

Policy Number	Plan	Status	Last Premium Received	Next Premium Due	Premium Amount (Rs.)	Premium Frequency	Fund Details
123456789	Max Life Fortune Builder	Premium Paying	15/03/2020	15/03/2020	50000.01	Annual	View Switch Online Pay Online

1 Click on "My Policies"

2 Click on "Switch Online"

Switching page

22/11/2013

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Log Off

Switch Online

3 Enter the desired Switching %

Instructions:

- Please enter the percentages on the right hand side to place your switch request.
- You will not be able to allocate money to a fund once you have de-allocated money out of the same fund and vice-versa.
- Minimum amount and percentage to be de-allocated from a fund is Rs 5000/- and 20% respectively, which ever is greater.
- Minimum amount left in the fund post de-allocation should be greater than equal to Rs. 5000

Current Fund Allocation [From Fund]				Target Fund (Enter Value in Percentage)			
Fund Name	No. of Units	NAV as on 30/12/2020	Fund Value as on 30/12/2020	Conservative Fund-Pr Driven - ULIF00325/06/04LIFECONSER104	Secure Fund-Pr Driven - ULIF00425/06/04LIFESECURE104	Growth Super Fund-Pr Driven - ULIF01108/02/07LIFEGRW SUP104	Balanced Fund-Pr Driven - ULIF00225/06/04LIFEBALANC104
Secure Fund-Pr Driven - ULIF00425/06/04LIFESECURE104	2844	15.6	41253.72	<input type="text" value="50"/>	-NA-	<input type="text"/>	<input type="text"/>
Balanced Fund-Pr Driven - ULIF00225/06/04LIFEBALANC104	3967	15.6	61880.67	<input type="text"/>	--	<input type="text" value="50"/>	-NA-
Total			103134.39				

4 Press "Submit"

Disclaimers:

- You may switch units between available funds, subject to a minimum switch amount of Rs 5000/- and 20% whichever is greater.

Print

How to Redirect Premium online

✓ Follow the steps mentioned below to Redirect Premium online

Policy Number	Plan	Status	Last Premium Received	Next Premium Due	Premium Amount (Rs.)	Premium Frequency	Fund Details
123456789	Max Life Life Invest Unit Linked Investment Plan	Premium Holiday	17/04/2013	24/09/2013	25000.00	SemiAnnual	View Switch Online Pay Online
123456789	Max Life Smart Invest Pension Super (Regular Plan)	Premium Paying	27/06/2013	25/06/2014	30000.00	Annual	View Switch Online Pay Online

Redirection page

Fund Type	Current Fund Allocation	Desired Fund Allocation
Conservative Fund-Pr Driven - ULIF00325/06/04LIFECONSER104	NA	100
Secure Fund-Pr Driven - ULIF00425/06/04LIFESECURE104	NA	0
Balanced Fund-Pr Driven - ULIF00225/06/04LIFEBALANC104	NA	0
Growth Fund-Pr Driven - ULIF00125/06/04LIFEGROWTH104	100	0

Disclaimer

- If you choose to redirect your future premiums to more than one fund, the percentage of such premiums redirected to each Fund shall be subject to a minimum percentage limit at the relevant time.
- Your request must specify precisely the Fund in which you wish to redirect the premiums.
- Maximum number of free redirection of funds within a year is as per product terms and conditions.
- If money is deposited on the same day of the request, then redirection would take precedence over the money deposited and future funds received will be allocated based on new allocation split.
- All requests for redirection received up to 3:00 p.m. will be processed at the closing NAV of the day on which the request is received. All such requests received after 3:00 p.m. will be processed at the closing NAV of the next business day.

How to change ECS draw date

✓ Follow the simple steps mentioned below to change the ECS draw date if already registered for ECS



Registration Number:104
Last Log On:
29/08/2017
Log Off

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Grievance Redressal Policy

13/01/2014

Personal Profile >
Policies >
Service Requests >
Payment History >
E-Statements >
Downloads >
Mailbox >
Transact Online ▾
• Change ECS Draw Date
• Change In Bonus Option
• Redirect Online
• Change In NFO Option

1 Click here to "Change ECS Draw Date"

2 Fill the Mandatory Fields

3 Press "Submit"

Change ECS Draw Date

Select Policy* : 123456789

Your current draw date: 8

Change Draw Date to* : 23

This option allows you to change the draw dates of the regular premium payment that you are making through the ECS.

Disclaimer

The Money Draw Date will be reflected in next 10 days.

The policies in the drop down shows the list of the policies whose status is premium paying and payment mode is ECS.

Submit Reset

Inbox(3 Unread Mails)

Contact us NAVs Tools & Calcs

Call Toll Free:
1800 200 4003

Email Us :
goldcircle@maxlifeinsurance.com

SMS :
"GOLD" to 5424243
"Life" to 54242

Branch Locator
Write to My Servicing Agent

How to change Bonus option

✓ Follow the simple steps mentioned below to change the Bonus option in case of Traditional plans (where applicable)

MAX LIFE INSURANCE

Registration Number: 104
Last Log On: 29/08/2017
Log Off

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks Grievance Redressal Policy

13/01/2014

Personal Profile >
Policies >
Service Requests >
Payment History >
E-Statements >
Downloads >
Mailbox >
Transact Online ▾
• Change ECS Draw Date
• Change In Bonus Option
• Redirect Online
• Change In NFO Option

Change Bonus Option

Select Your Policy to Change Bonus Option* : 123456789

Your Current Bonus Option: Buy Paid up Additions

Change to* : Paid in Cash

Fill the Mandatory Fields

This option helps you to change the Bonus Option of the policy.

Disclaimer

(i) Bonus option will be effective from the next anniversary date if the request has been made 5 days before the Policy Anniversary Date.
(ii) The policies which are given in the list are those which have Bonus Option and their status is premium paying.
(iii) You will be not be able to log a request if the Bonus Option selected by you and the list of options in "Change TO" are same

1 Click here to "Change in Bonus Option"

2 Fill the Mandatory Fields

3 Press "Submit"

Submit Reset

Inbox(3 Unread Mails)

Contact us NAVs Tools & Calcs

Call Toll Free: 1800 200 4003
Email Us : goldcircle@maxlifeinsurance.com
SMS : "GOLD" to 5424243 "Life" to 54242
Branch Locator
Write to My Servicing Agent

How to change Non Forfeiture option

✓ Follow the simple steps mentioned below to change the NFO option in case of Traditional plans (where applicable)

The screenshot displays the 'Change NFO Option' form on the MAX LIFE website. The navigation bar at the top includes Home, About Us, Products, Fund Performance, Process Information, Premium Payment Options, Work With Us, Contact Us, Agent Speaks, and Grievance Redressal Policy. The left sidebar shows the date 13/01/2014 and various menu items like Personal Profile, Policies, Service Requests, Payment History, E-Statements, Downloads, Mailbox, and Transact Online. The main content area is titled 'Change NFO Option' and contains the following fields:

- Select Policy* :** 123456789
- Post Lapse Option:** Reduced Paid Up
- Change to * :** Extended Term Insurance

A bracket groups these three fields with the instruction 'Fill the Mandatory Fields'. Below the form, a disclaimer states: 'This option helps you to change the Non Forfeiture Option of the Policy.' and '(i) Please do not log a request if the current Post Lapse Option and the value in Change To are same. (ii) The policies which are given in the list are those which have NFO Option and their status is premium paying.'

Three numbered steps are indicated:

- 1**: An arrow points to the 'Change In NFO Option' link in the 'Transact Online' menu.
- 2**: A bracket groups the 'Select Policy*', 'Post Lapse Option', and 'Change to *' fields.
- 3**: An arrow points to the 'Submit' button at the bottom of the form.

At the bottom of the page, there are 'Submit' and 'Reset' buttons. A right sidebar contains an 'Inbox (3 Unread Mails)' notification and a 'Contact us' section with NAVs and Tools & Calcs, including a toll-free number (1800 200 4003), email (goldcircle@maxlifeinsurance.com), and SMS options.

How to download consolidated Premium statement

✓ Download consolidated Premium statement by following the steps mentioned below

25/11/2013

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks

Registered User

Username or Client ID*:

Password:

Submit

To Generate Consolidated Premium Receipt, Please [Click here](#)

1 ↓ Press "Click here"

New user? [Register here](#)

Forgot Username/Password? [Click here](#)

*Your Max Life Insurance Client ID is your Login ID.

Site best viewed in 1024 x 768 resolution with Internet Explorer 6.0, 7.0 and 8.0

Contact us NAVs Tools & Calcs

Call Toll Free: 1800 180 5577 (BSNL/MTNL) or 1800 200 5577

Email Us : service.helpdesk@maxlifeinsurance.com

SMS : "QUERY" to 5424243 "Life" to 54242

[Branch Locator](#)

[Write to My Servicing Agent](#)

25/11/2013

Home About Us Products Fund Performance Process Information Premium Payment Options Work With Us Contact Us Agent Speaks

Generate Consolidated Premium Receipt

Policy Number* :	<input type="text" value="123456789"/>
Date Of Birth* :	<input type="text" value="15/08/1980"/>
Start Date* :	<input type="text" value="01/01/2013"/>
End Date* :	<input type="text" value="01/11/2013"/>

Note: "Dear Customer, consolidated premium receipts is available 2004 onwards. For any other assistance please call us on 1800 200 5577 or email us at service.helpdesk@maxlifeinsurance.com"

2 Provide the Mandatory Field

Click Generate Statement to view the statement

3 ↓

Generate Statement Cancel

Contact us NAVs Tools & Calcs

Call Toll Free: 1800 180 5577 (BSNL/MTNL) or 1800 200 5577

Email Us : service.helpdesk@maxlifeinsurance.com

SMS : "QUERY" to 5424243 "Life" to 54242

[Branch Locator](#)

[Write to My Servicing Agent](#)

Thank you