

RELIANCE

NIPPON LIFE
INSURANCE

A RELIANCE CAPITAL COMPANY

My love for you,
in numbers.



A record of our investments.

My Dear _____

I know, I don't say often enough how much I love you and our family. You are the centre of my universe, you are the reason why I try to grow and prosper in life.

You know that I intend to be by your side always. But sometimes, life has other plans. And if the unexpected happens, the last thing I would want is for you to feel helpless or alone.

That's why, I've decided to put down the important details of all our investments in this booklet. Life insurance, fixed deposits, SIPs, demat account, health plans – all the information you need to be financially secure and strong, is right here.

I may not find the right words to tell you, but these are numbers that you can always count on.

Yours always.

My Personal Details



Name: _____

(As it appears on Official Records)

Address (Current): _____

Address (Permanent): _____

Mobile No(s): _____

Email ID(s): _____

My Document Details

Aadhaar No:

PAN:

Passport No.:

Driving Licence No.:

Voter ID No:

Ration Card No:

Where are these documents? _____



Our Term Plan: the cornerstone of our security.



Name of Insurance Company: _____

Company's Address: _____

Company's Contact Number: _____

Policy Name: _____

Policy Number: _____

Online ID: _____ Password: _____

Sum Assured: _____

Date of Issuance: _____

Date of Maturity: _____

Premiums Paid:

☐ Y1 ☐ Y2 ☐ Y3 ☐ Y4 ☐ Y5 ☐ Y6 ☐ Y7 ☐ Y8 ☐ Y9 ☐ Y10

☐ Y11 ☐ Y12 ☐ Y13 ☐ Y14 ☐ Y15 ☐ Y16 ☐ Y17 ☐ Y18 ☐ Y19 ☐ Y20

☐ Y21 ☐ Y22 ☐ Y23 ☐ Y24 ☐ Y25 ☐ Y26 ☐ Y27 ☐ Y28 ☐ Y29 ☐ Y30

☐ Y31 ☐ Y32 ☐ Y33 ☐ Y34 ☐ Y35 ☐ Y36 ☐ Y37 ☐ Y38 ☐ Y39 ☐ Y40

☐ Y41 ☐ Y42 ☐ Y43 ☐ Y44 ☐ Y45 ☐ Y46 ☐ Y47 ☐ Y48 ☐ Y49 ☐ Y50

Riders Added: ☐ Y ☐ N

Name and other information: _____

Other Features: _____

Agent's Name: _____

Agent's Contact Number: _____

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Our SIPs/Other MFs: slow and steady wins the race.



Company Name	Name of Fund	Payment Term (M/Q/Y)	Outgo (₹)	Payment Start Date	Payment Due Date	End Date	Maturity Amount (₹)	Online ID	Password

Our SIPs/Other MFs: slow and steady wins the race.



Company Name	Name of Fund	Payment Term (M/Q/Y)	Outgo (₹)	Payment Start Date	Payment Due Date	End Date	Maturity Amount (₹)	Online ID	Password

Our FDs:
like me, they're always reliable!



Bank Name	FD Number	Date of Investment	Invested Amount (₹)	Interest Rate	Maturity Date	Renewal Date	Maturity Amount (₹)

Our FDs:
like me, they're always reliable!



Bank Name	FD Number	Date of Investment	Invested Amount (₹)	Interest Rate	Maturity Date	Renewal Date	Maturity Amount (₹)

Our Health Insurance:

with you, in sickness
and in health.



Policy Number	Name of the Company	Type of Coverage	Online ID	Password

Location of Policies: _____




Advisor Name: _____

Advisor Contact Number: _____

Other Insurance:
we've made safety
our family's policy!



Policy Number	Name of the Company	Type of Coverage	Online ID	Password

Location of Policies: _____ 

Advisor Name: _____

Advisor Contact Number: _____

Our Credit Card(s):

when we need a little extra from life.



Name of the Bank	Credit Card Number	Expiry Date	CVV

Our Demat Account(s): our 'share' of prosperity.



Name of the Bank	Demat Account Number	Client ID with Broker	Current Value	Password

Location of Broker Agreement: _____ 

Broker Name: _____

Broker Contact Number: _____

Our Liabilities: may they part ways with us soon!




Personal Loan:

Bank/Company Name	Loan Account Number	Amount	Tenure	EMI

Location of Documents: _____ 

Car Loan:

Bank/Company Name	Loan Account Number	Amount	Tenure	EMI

Location of Documents: _____ 

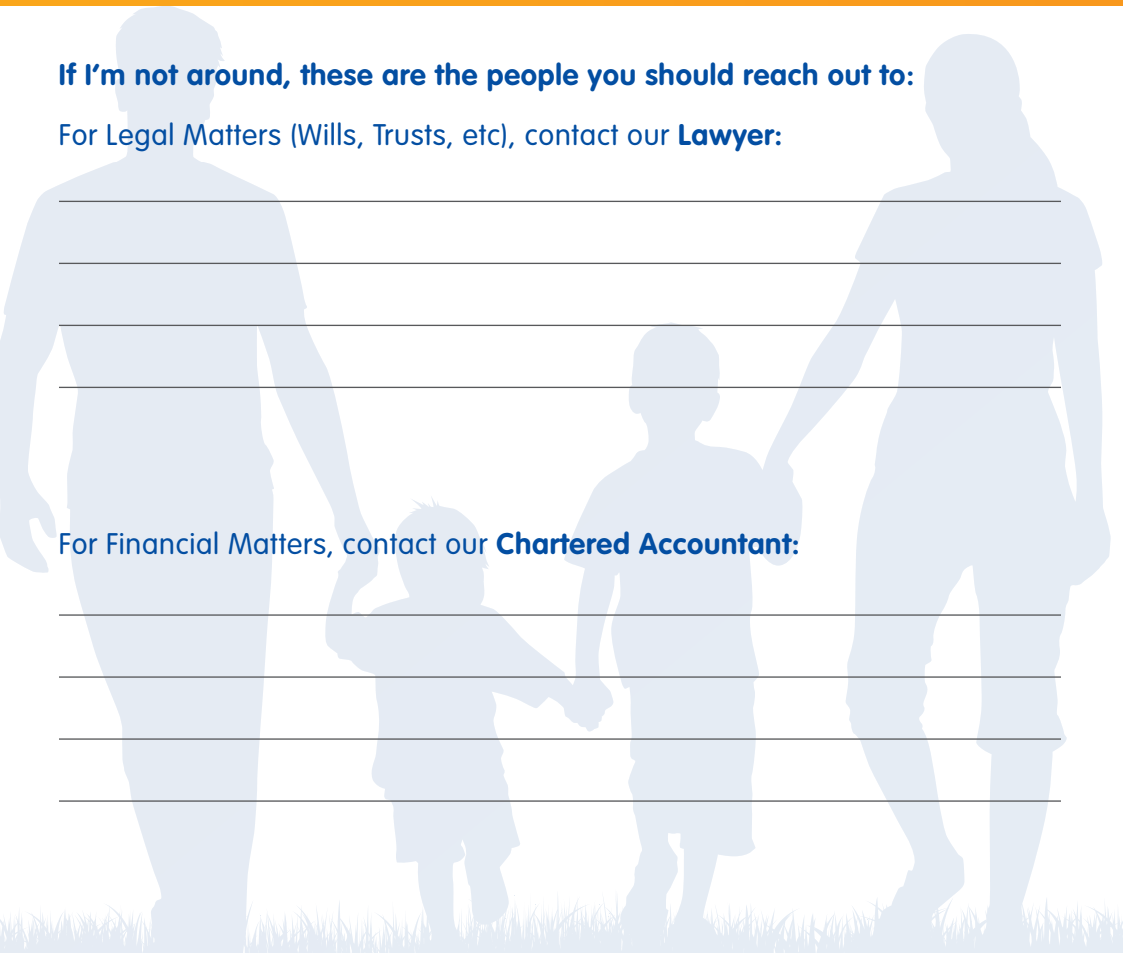
Important Contacts: the cornerstone of our security.



If I'm not around, these are the people you should reach out to:

For Legal Matters (Wills, Trusts, etc), contact our **Lawyer:**

For Financial Matters, contact our **Chartered Accountant:**





**NIPPON LIFE
INSURANCE**

Reliance Nippon Life Insurance Company Limited. IRDAI Registration No: 121. Registered & Corporate Office: Reliance Centre, 5th floor, Off Western Express Highway, Santacruz East, Mumbai, Mumbai-City District, Maharashtra-400055. For more information or any grievance, 1. Call us between 9am to 6pm, Monday to Saturday on our Toll Free Number 1800 102 1010 or 2. Visit us at www.reliancenipponlife.com or 3. Email us at: rnlife.customerservice@relianceada.com. Trade logo displayed above belongs to Anil Dhirubhai Ambani Ventures Private Limited & Nippon Life Insurance Company and used by Reliance Nippon Life Insurance Company Limited under license. Tax laws are subject to change. Consulting a tax expert is advisable. For more details on risk factors, terms and conditions, please read the sales brochure carefully before concluding a sale. If you wish to stop receiving emails from us, please click on the link below to unsubscribe from mailing list.

BEWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS/FRAUDULENT OFFERS: IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint.