



IndusInd Nippon Life

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.

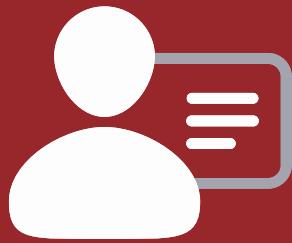
You know that I intend to be by your side always. But sometimes, life has other plans. And if the unexpected happens, the last thing I would want is for you to feel helpless or alone.

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: _____

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:

<input type="checkbox"/> Y1	<input type="checkbox"/> Y2	<input type="checkbox"/> Y3	<input type="checkbox"/> Y4	<input type="checkbox"/> Y5	<input type="checkbox"/> Y6	<input type="checkbox"/> Y7	<input type="checkbox"/> Y8	<input type="checkbox"/> Y9	<input type="checkbox"/> Y10
<input type="checkbox"/> Y11	<input type="checkbox"/> Y12	<input type="checkbox"/> Y13	<input type="checkbox"/> Y14	<input type="checkbox"/> Y15	<input type="checkbox"/> Y16	<input type="checkbox"/> Y17	<input type="checkbox"/> Y18	<input type="checkbox"/> Y19	<input type="checkbox"/> Y20
<input type="checkbox"/> Y21	<input type="checkbox"/> Y22	<input type="checkbox"/> Y23	<input type="checkbox"/> Y24	<input type="checkbox"/> Y25	<input type="checkbox"/> Y26	<input type="checkbox"/> Y27	<input type="checkbox"/> Y28	<input type="checkbox"/> Y29	<input type="checkbox"/> Y30
<input type="checkbox"/> Y31	<input type="checkbox"/> Y32	<input type="checkbox"/> Y33	<input type="checkbox"/> Y34	<input type="checkbox"/> Y35	<input type="checkbox"/> Y36	<input type="checkbox"/> Y37	<input type="checkbox"/> Y38	<input type="checkbox"/> Y39	<input type="checkbox"/> Y40
<input type="checkbox"/> Y41	<input type="checkbox"/> Y42	<input type="checkbox"/> Y43	<input type="checkbox"/> Y44	<input type="checkbox"/> Y45	<input type="checkbox"/> Y46	<input type="checkbox"/> Y47	<input type="checkbox"/> Y48	<input type="checkbox"/> Y49	<input type="checkbox"/> Y50

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Policy Number: _____

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Sum Assured: _____

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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

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Riders Added: Y N

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Other Features: _____

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Company's Address: _____

Company's Contact Number: _____

Policy Name: _____

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Online ID: _____ Password: _____

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Y41 Y42 Y43 Y44 Y45 Y46 Y47 Y48 Y49 Y50

Riders Added: Y N

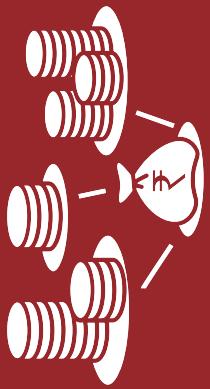
Name and other information: _____

Other Features: _____

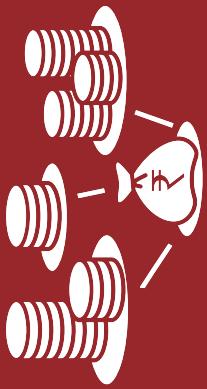
Agent's Name: _____

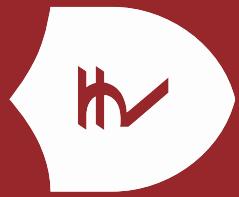
Agent's Contact Number: _____

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



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





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 (₹)
State Bank of India	FD123456789	2023-01-15	50,000	6.5%	2024-07-15	2024-07-15	53,125
ICICI Bank	FD987654321	2023-02-28	45,000	6.8%	2024-08-28	2024-08-28	48,675
Axis Bank	FD765432109	2023-03-15	60,000	7.0%	2024-09-15	2024-09-15	64,200
Bank of Baroda	FD543210987	2023-04-10	40,000	6.2%	2024-10-10	2024-10-10	42,400
Union Bank of India	FD321098765	2023-05-05	55,000	6.7%	2024-11-05	2024-11-05	58,375
Yes Bank	FD109876543	2023-06-20	48,000	6.9%	2024-12-20	2024-12-20	51,840
IndusInd Bank	FD987654321	2023-07-10	52,000	7.1%	2024-01-10	2024-01-10	56,120
HDFC Bank	FD765432109	2023-08-15	42,000	6.6%	2024-04-15	2024-04-15	45,060
Canara Bank	FD543210987	2023-09-05	38,000	6.4%	2024-05-05	2024-05-05	41,560
PNB	FD321098765	2023-10-10	44,000	6.3%	2024-06-10	2024-06-10	46,480
Bank of Maharashtra	FD109876543	2023-11-20	58,000	7.2%	2024-07-20	2024-07-20	62,160
Bank of Baroda	FD987654321	2023-12-15	46,000	6.6%	2024-03-15	2024-03-15	49,310



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 (₹)
State Bank of India	FD123456789	2023-01-15	50,000	6.5%	2024-06-30	2024-06-30	53,125
ICICI Bank	FD987654321	2023-02-28	45,000	6.8%	2024-07-31	2024-07-31	48,150
Axis Bank	FD765432109	2023-03-15	60,000	7.0%	2024-08-31	2024-08-31	64,200
Bank of Baroda	FD543210987	2023-04-10	40,000	6.2%	2024-09-30	2024-09-30	42,400
Union Bank of India	FD321098765	2023-05-05	55,000	6.7%	2024-10-31	2024-10-31	58,375
Yes Bank	FD109876543	2023-06-20	48,000	6.9%	2024-11-30	2024-11-30	51,360
SBI Retail	FD987654321	2023-07-10	52,000	7.1%	2024-12-31	2024-12-31	56,120
IndusInd Bank	FD765432109	2023-08-15	42,000	6.6%	2024-01-31	2024-01-31	44,640
PNB	FD543210987	2023-09-20	58,000	6.9%	2024-04-30	2024-04-30	61,240
Chennai Bank	FD321098765	2023-10-10	46,000	6.4%	2024-07-31	2024-07-31	49,144
Bank of Maharashtra	FD109876543	2023-11-05	51,000	6.8%	2024-10-31	2024-10-31	54,510
Bank of Kharagpur	FD987654321	2023-12-05	43,000	6.3%	2024-03-31	2024-03-31	45,159
Bank of Maharashtra	FD765432109	2023-12-20	59,000	7.0%	2024-11-30	2024-11-30	64,110
Bank of Kharagpur	FD543210987	2024-01-10	47,000	6.5%	2024-04-30	2024-04-30	49,495
Bank of Maharashtra	FD321098765	2024-02-15	53,000	6.7%	2024-07-31	2024-07-31	56,441
Bank of Kharagpur	FD109876543	2024-03-10	49,000	6.6%	2024-10-31	2024-10-31	52,366
Bank of Maharashtra	FD987654321	2024-04-15	56,000	7.0%	2024-12-31	2024-12-31	62,720
Bank of Kharagpur	FD765432109	2024-05-20	45,000	6.4%	2024-08-31	2024-08-31	47,250
Bank of Maharashtra	FD543210987	2024-06-10	57,000	6.8%	2024-11-30	2024-11-30	63,494
Bank of Kharagpur	FD321098765	2024-07-15	48,000	6.5%	2024-10-31	2024-10-31	50,520
Bank of Maharashtra	FD109876543	2024-08-20	52,000	7.0%	2024-12-31	2024-12-31	59,440
Bank of Kharagpur	FD987654321	2024-09-10	46,000	6.6%	2024-11-30	2024-11-30	48,626
Bank of Maharashtra	FD765432109	2024-10-15	58,000	6.9%	2024-12-31	2024-12-31	63,448
Bank of Kharagpur	FD543210987	2024-11-20	44,000	6.3%	2024-01-31	2024-01-31	45,772
Bank of Maharashtra	FD321098765	2024-12-10	55,000	7.0%	2024-04-30	2024-04-30	60,500
Bank of Kharagpur	FD109876543	2025-01-15	42,000	6.5%	2024-06-30	2024-06-30	43,900
Bank of Maharashtra	FD987654321	2025-02-20	59,000	7.0%	2024-09-30	2024-09-30	64,190
Bank of Kharagpur	FD765432109	2025-03-10	47,000	6.4%	2024-11-30	2024-11-30	49,219
Bank of Maharashtra	FD543210987	2025-04-15	53,000	6.8%	2024-12-31	2024-12-31	60,448
Bank of Kharagpur	FD321098765	2025-05-10	49,000	6.6%	2024-01-31	2024-01-31	51,566
Bank of Maharashtra	FD109876543	2025-06-15	56,000	7.0%	2024-04-30	2024-04-30	63,320
Bank of Kharagpur	FD987654321	2025-07-20	45,000	6.3%	2024-06-30	2024-06-30	46,750
Bank of Maharashtra	FD765432109	2025-08-10	57,000	6.9%	2024-09-30	2024-09-30	64,117
Bank of Kharagpur	FD543210987	2025-09-15	43,000	6.5%	2024-11-30	2024-11-30	44,995
Bank of Maharashtra	FD321098765	2025-10-10	58,000	7.0%	2024-12-31	2024-12-31	65,440
Bank of Kharagpur	FD109876543	2025-11-20	46,000	6.4%	2024-01-31	2024-01-31	47,252
Bank of Maharashtra	FD987654321	2025-12-10	54,000	6.8%	2024-04-30	2024-04-30	61,240
Bank of Kharagpur	FD765432109	2026-01-15	48,000	6.6%	2024-06-30	2024-06-30	50,520
Bank of Maharashtra	FD543210987	2026-02-20	59,000	7.0%	2024-09-30	2024-09-30	64,190
Bank of Kharagpur	FD321098765	2026-03-10	45,000	6.3%	2024-11-30	2024-11-30	46,750
Bank of Maharashtra	FD109876543	2026-04-15	56,000	6.9%	2024-12-31	2024-12-31	63,320
Bank of Kharagpur	FD987654321	2026-05-10	43,000	6.5%	2024-01-31	2024-01-31	44,995
Bank of Maharashtra	FD765432109	2026-06-10	57,000	7.0%	2024-04-30	2024-04-30	64,117
Bank of Kharagpur	FD543210987	2026-07-20	44,000	6.4%	2024-06-30	2024-06-30	47,252
Bank of Maharashtra	FD321098765	2026-08-10	58,000	6.8%	2024-09-30	2024-09-30	64,190
Bank of Kharagpur	FD109876543	2026-09-15	46,000	6.6%	2024-11-30	2024-11-30	50,520
Bank of Maharashtra	FD987654321	2026-10-10	55,000	7.0%	2024-12-31	2024-12-31	61,240
Bank of Kharagpur	FD765432109	2026-11-20	47,000	6.3%	2024-01-31	2024-01-31	46,750
Bank of Maharashtra	FD543210987	2026-12-10	59,000	6.9%	2024-04-30	2024-04-30	64,190
Bank of Kharagpur	FD321098765	2027-01-15	44,000	6.5%	2024-06-30	2024-06-30	47,252
Bank of Maharashtra	FD109876543	2027-02-20	56,000	7.0%	2024-09-30	2024-09-30	63,320
Bank of Kharagpur	FD987654321	2027-03-10	42,000	6.3%	2024-11-30	2024-11-30	44,995
Bank of Maharashtra	FD765432109	2027-04-15	57,000	6.8%	2024-12-31	2024-12-31	64,117
Bank of Kharagpur	FD543210987	2027-05-10	45,000	6.6%	2024-01-31	2024-01-31	47,252
Bank of Maharashtra	FD321098765	2027-06-10	59,000	7.0%	2024-04-30	2024-04-30	64,190
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Bank of Kharagpur	FD321098765	2027-11-20	45,000	6.3%	2024-01-31	2024-01-31	47,252
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Bank of Kharagpur	FD321098765	2032-01-15	43,000	6.6%	2024-06-30	2024-06-30	44,995
Bank of Maharashtra	FD109876543	2032-02-20	57,000	7.0%	2024-09-30	2024-09-30	61,240
Bank of Kharagpur	FD987654321	2032-03-10	45,000	6.4%	2024-11-30	2024-11-30	47,252
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Bank of Maharashtra	FD321098765	2032-06-10	57,000	7.0%	2024-04-30	2024-04-30	61,240
Bank of Kharagpur	FD109876543	2032-07-20	43,000	6.3%	2024-06-30	2024-06-30	47,252
Bank of Maharashtra	FD987654321	2032-08-10</td					



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**:



IndusInd Nippon Life Insurance Company Limited (Formerly Reliance Nippon Life Insurance Company Limited). IRDAI Registration No. 121. Registered & Corporate Office: Unit Nos. 401B, 402, 403 & 404, 4th Floor, Inspire-BKC, G Block, BKC Main Road, Bandra Kurla Complex, Bandra East, Mumbai-400051, India. T +91 22 6896 5000. For more information or any grievance, 1. Call us between 8 am to 8 pm, Monday to Saturday (except public holidays) on our Toll-Free Number - 1800 102 1010 or 2. Visit us at www.indusindnipponlife.com 3. Email us at customerservice@indusindnipponlife.com. 4. Chat with us on our WhatsApp number (+91) 7208852700. The trade logo displayed above belongs to IndusInd International Holdings Limited & Nippon Life Insurance Company and is used by IndusInd 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.

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