



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.

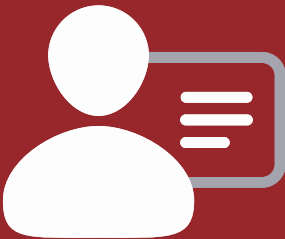
I may not find the right words to tell you, but these are numbers that you can always count on.

Yours always.



**IndusInd** | Nippon Life

# 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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Name and other information: \_\_\_\_\_

Other Features: \_\_\_\_\_

Agent's Name: \_\_\_\_\_

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Policy Number: \_\_\_\_\_

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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
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Riders Added: ☐ Y ☐ N

Name and other information: \_\_\_\_\_

Other Features: \_\_\_\_\_

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Agent's Contact Number: \_\_\_\_\_



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A stylized illustration of three human figures in blue and white, standing on a grid background. The figures are positioned in a row, with the central figure slightly behind the other two. The grid consists of light gray lines forming a pattern of squares. The figures are composed of solid blue and white shapes, with some areas appearing to be cut out or layered. The overall style is modern and minimalist.

# Our FDS:

like me, they're always reliable!

[illegible]

# 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:**

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

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**IndusInd** Nippon Life

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](http://www.indusindnipponlife.com) 3. Email us at [customerservice@indusindnipponlife.com](mailto: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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