Life Insurance Buying Guide – ICICI Prudential

Step 1: Login to [www.icicidirect.com](http://www.icicidirect.com)

Step 2: Click on Insurance
Step 3: Select a plan from the options and click on Check your premium
Step 5: Click on “Proceed”

You will be redirected to ICICI Prudential respective product page. The journey for all the Life Insurance plans is as mentioned below:
Calculate EBI

Select Premium Payment Term & Mode

Select other relevant details.

In case of ULIP

Click on "Continue"

Basic Detail Page

This page allows you to enter basic details:

- LA Name & Last Name
- Fathers Name
- Mothers Name
- Spouse Name
- Marital Status
- Education
- Occupation
- Name of Organization
- Organization type
- Income Tax proof
- KYC Number
- GSTIN
- Annual Income

Details of Life Assured

- Life Assured First Name
- Life Assured Last Name
- Date of Birth
- Sex
- Relationship
- Name of Organization
- Name of Organisation
- Organization Type
- Are you engaged in any of the mentioned industries(Export, Jewellery, Real Estate, Scrap Dealer, Shipping, Hotel Booking & Agriculture)
- Income Tax proof
- GSTIN
- Annual Income

Click on "Continue"
Basic Detail Page

This page allows you to enter basic details:

- Age Proof
- Address Proof
- Identity Proof

Are you a Political Excluded Person?

Select any one Insurance Repository for opening an insurance Account.

Capture Nominee Details
- Nominee Name
- Relationship
- Gender
- DOB

If nominee is minor, then appointed details needs to be captured.

Click on "Continue"
FATCA & CRS

This page provides to capture FATCA & CSR information

Enter TIN/PAN details of resident country

FATCA info is to be captured where customer is tax resident of country other than India

Communications Address Page

Enter Communication address

If communication address is different from Permanent address, add permanent address as well
This page provides to capture Habits of client.

Mark “YES” if customer takes tobacco / alcohol in any of the form however.
Mark “NO” if he does not take or has stopped consumption of tobacco or alcohol for last 5 yrs.

In case any question is answered as “YES” please enter details of that ailment in the space provided.

Click on “Continue”
Payout mandate page

Important Page for ECS Mandate information
- Account holder name
- Bank account number
- Bank Name
- IFSC Code
- MICR Code
- Type of account
- Amount
- Frequency

Pay-out mandate is compulsory for non-term plan, for term it is required only if customer wants to set ECS for renewals.

Click on "Continue"

Review page

Page to review your application
- Sales Details
- Product Details
- Details of LA

DOB, Gender & Product is not editable

To edit any information filled
Payment page

Important Page for Payment of the premium

Select Source of Funds
- Savings
- Income
- Inheritance
- Others
- Salary
- Sale of Assets

Payment Options
- Cheque
- Demand Draft
- Debt Authorization
- Card
- net Banking
- Wallet
- MPOS

One can SPJIT total premium and choose multiple payment options.

Thank you page

Thank You Page along with Premium Payment Acknowledgement

Thank You for choosing us.

We acknowledge the receipt of your premium payment of 7,200
for an ICICI Prudential Smart plan on 31 Mar 2020 through MPOS

IMPORTANT: Upload your Documents
To process your application, we require all proof documents.
If you haven’t uploaded the documents yet, please do so now.

Downloaded Documents
- Proposal Confirmation
- Application Forms
- Electronic Benefit Verification (EBV) Form
- Agent Confidential Report (ACR)
- Premium Payment Certificate
Upload documents

Uploaded documents will be immediately verified by system with information provided and instant acceptance or rejection pop-up is displayed.

App tracker

- Restart your journey in case disconnected
- Upload Documents
- Online CDF if not completed earlier
- Check issuance status

Just enter application no. & DOB and start from where you left.