

# Life Insurance



## मनी ट्रांसफर ग्राहक को जीवन बीमा की **5x ज़्यादा ज़रूरत** है



- वह अपने परिवार का अकेला कमाने वाला होता है
- वह जोखिम भरे काम करता है - फैक्ट्री, मज़दूर, खेती, ड्राइवर
- उसकी जमा पूँजी बेहद मामूली होती है



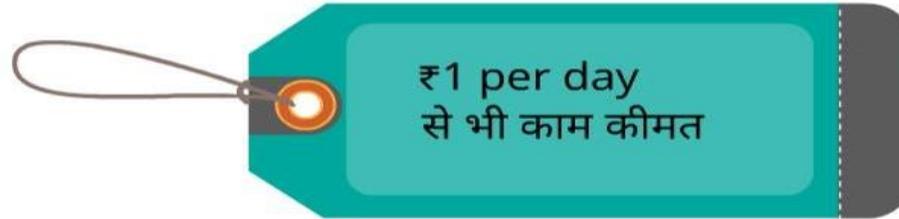
अकस्मात् मृत्यु होने पर बीमा राशि परिवार का आर्थिक सहारा बनता है।

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# Product Highlights



अब आप अपने customer को बेच सकते हैं  
सबसे किफ़ायती जीवन बिमा



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## Kotak Life Insurance का भरोसा 5 minute में बीमा जारी



- १ साल के भीतर बीमा धारक की मौत होने पर nominee को मिलेगा बीमा राशि (१ / २ लाख) का लाभ
- बिमा पाने के लिए व्यक्ति की आयु 18 - 50 वर्ष होनी चाहिए

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# One time + Renewal incomes

शानदार आय  
₹1500 - 2000 per month

customer बीमा renew हर साल आप ही के दूकान से करवाएगा

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Claim कैसे पाएं?



Claim पाना बहुत ही आसान. कहीं जाने की ज़रुरत नहीं. घर बैठे claim पाएं :

1. Call 022 - 66057294 Support executive will guide the caller  
MON - FRI, 10:00 AM to 6:00 PM
2. He will confirm the documents required:
  - ID & Address proof of insured
  - ID & Address proof of nominee
  - Doctors certificate (death certificate)
  - Claim intimation form
  - Bank account details of nominee
3. Courier these documents to Kotak Address given by support executive

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# Google

## कैसे बेचना है बीमा?

Process समझने के लिए सबसे पहले अपना बीमा निकालें

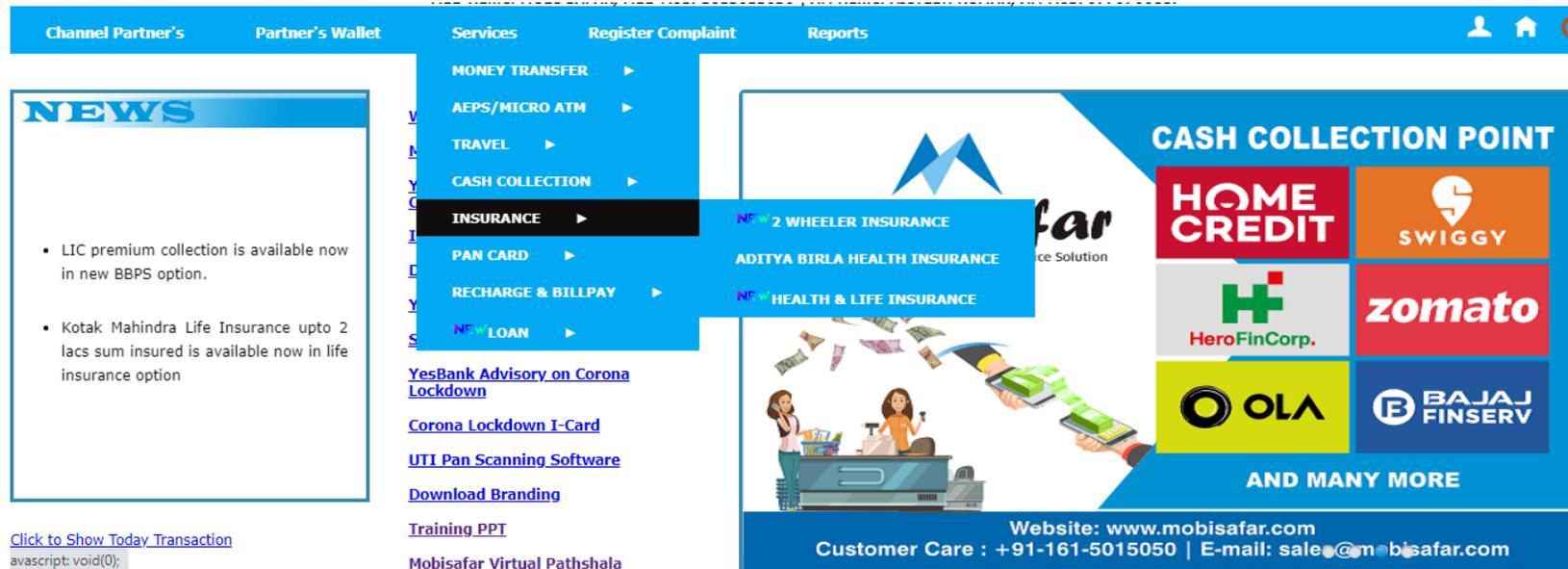
Process समझने के बाद अपने सभी customers को बीमा के बारे में बताएं  
कई ग्राहक शुरुआत में बीमा नहीं लेंगे। मगर आपको फिर भी बीमा के बारे में सबको बताते रहना है।  
ग्राहक के जान पहचान में जब कोई मृत्यु होगी, तब उसको आपकी बात याद आएगी, और वह बीमा ज़रूर लेगा



Instant  pay

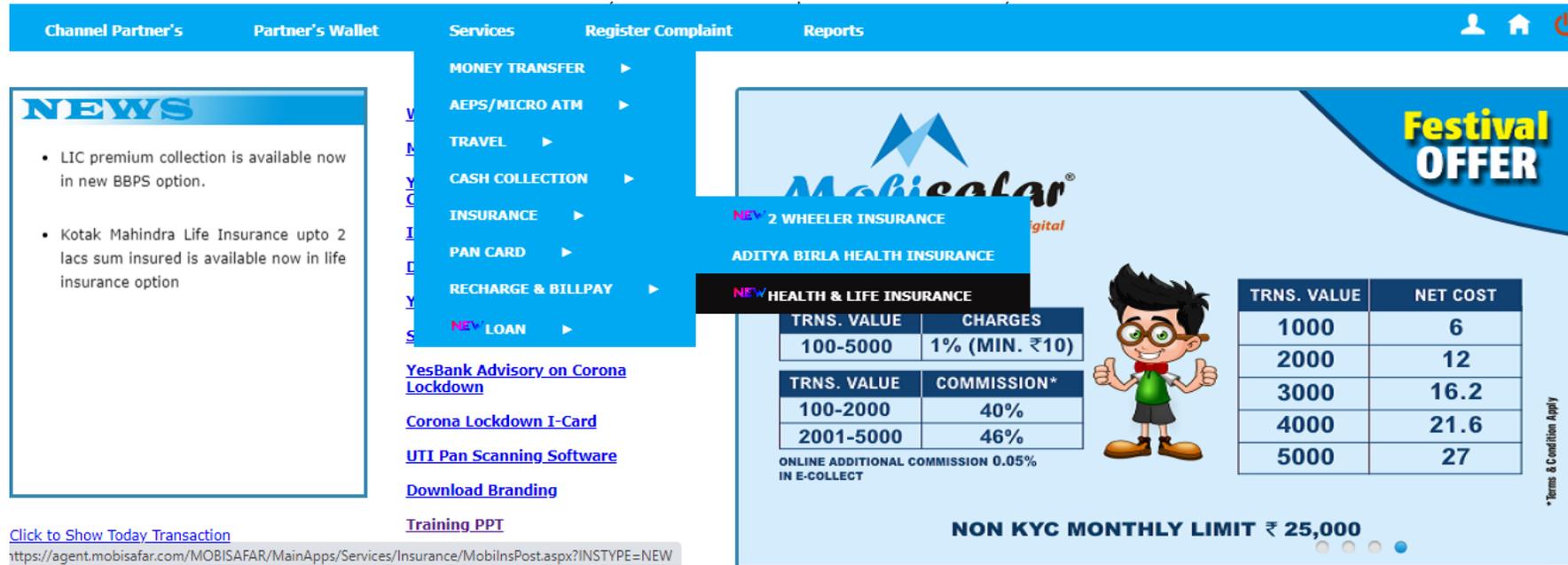
# PROCESS for LIFE INSURANCE

## Step 1 : Select Insurance under the Services tab



The screenshot displays the Mobisafar partner portal interface. The top navigation bar includes 'Channel Partner's', 'Partner's Wallet', 'Services', 'Register Complaint', and 'Reports'. The 'Services' menu is open, showing options like MONEY TRANSFER, AEPS/MICRO ATM, TRAVEL, CASH COLLECTION, INSURANCE (highlighted), PAN CARD, RECHARGE & BILLPAY, and LOAN. The 'INSURANCE' sub-menu lists 'WHEELER INSURANCE', 'ADITYA BIRLA HEALTH INSURANCE', and 'HEALTH & LIFE INSURANCE'. A 'NEWS' section on the left contains two bullet points: 'LIC premium collection is available now in new BBPS option.' and 'Kotak Mahindra Life Insurance upto 2 lacs sum insured is available now in life insurance option'. Below the news are links for 'YesBank Advisory on Corona Lockdown', 'Corona Lockdown I-Card', 'UTI Pan Scanning Software', 'Download Branding', 'Training PPT', and 'Mobisafar Virtual Pathshala'. The main content area features a 'CASH COLLECTION POINT' banner with logos for HOME CREDIT, SWIGGY, HeroFinCorp, zomato, OLA, and BAJAJ FINSERV. At the bottom, contact information is provided: Website: www.mobisafar.com, Customer Care : +91-161-5015050 | E-mail: sales@mobisafar.com.

## Step 2 : Go to Health & Life Insurance



The screenshot shows the Mobisafar agent dashboard. The top navigation bar includes 'Channel Partner's', 'Partner's Wallet', 'Services', 'Register Complaint', and 'Reports'. A 'NEWS' sidebar on the left contains updates about LIC premium collection and Kotak Mahindra Life Insurance. The 'Services' menu is open, highlighting 'NEW HEALTH & LIFE INSURANCE'. The main content area features a 'Festival Offer' banner with a cartoon character and two tables detailing transaction values, charges, and commissions. A 'NON KYC MONTHLY LIMIT ₹ 25,000' is also displayed.

**NEWS**

- LIC premium collection is available now in new BBPS option.
- Kotak Mahindra Life Insurance upto 2 lacs sum insured is available now in life insurance option

[YesBank Advisory on Corona Lockdown](#)

[Corona Lockdown I-Card](#)

[UTI Pan Scanning Software](#)

[Download Branding](#)

[Training PPT](#)

[Click to Show Today Transaction](#)

<https://agent.mobisafar.com/MOBISAFAR/MainApps/Services/Insurance/MobilnsPost.aspx?INSTYPE=NEW>

**NEW 2 WHEELER INSURANCE**

**ADITYA BIRLA HEALTH INSURANCE**

**NEW HEALTH & LIFE INSURANCE**

TRNS. VALUE	CHARGES
100-5000	1% (MIN. ₹10)

TRNS. VALUE	COMMISSION*
100-2000	40%
2001-5000	46%

ONLINE ADDITIONAL COMMISSION 0.05% IN E-COLLECT

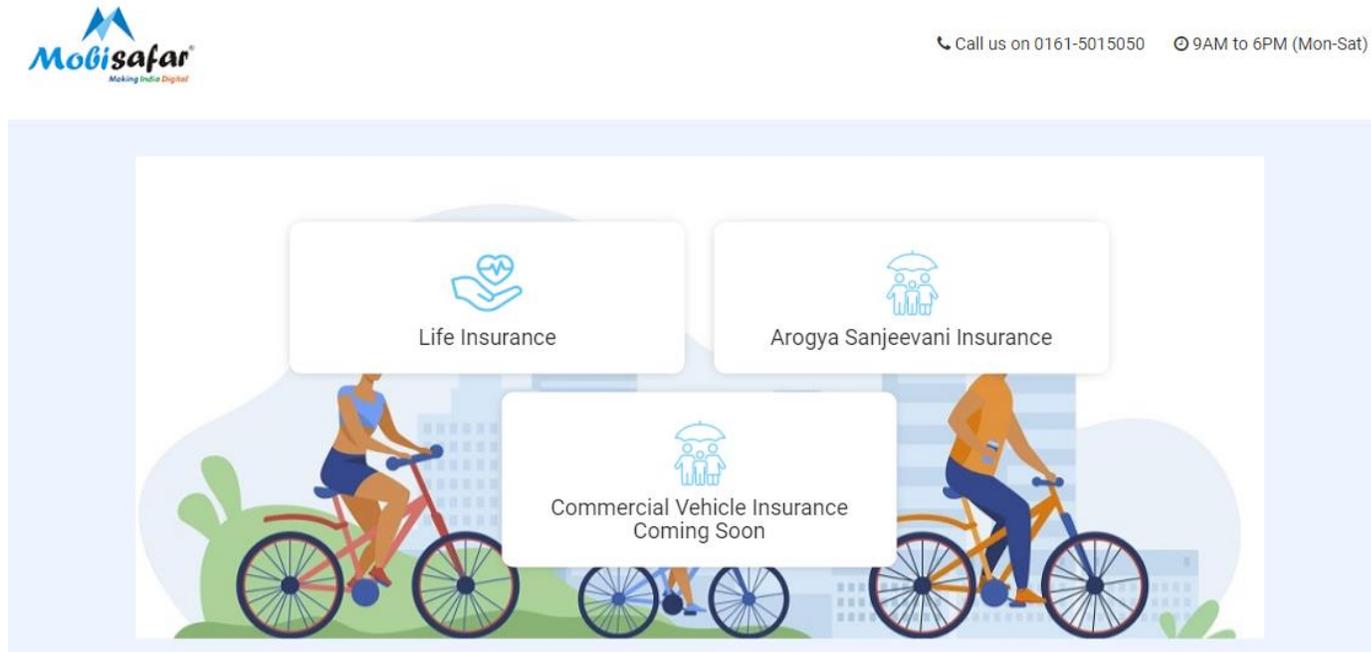
**Festival OFFER**

TRNS. VALUE	NET COST
1000	6
2000	12
3000	16.2
4000	21.6
5000	27

\*Terms & Condition Apply

**NON KYC MONTHLY LIMIT ₹ 25,000**

## Step 3 : A separate page will open, click on “Life Insurance”



## Step 4 : Enter Customer details like Name, Mobile Number Gender and Press Next.

1 STEP 1      2 STEP 2

Group Term Insurance



I am a

Male  Female

My number is

10 - digit mobile number

Proposer name is

Full Name

Next



## Step 5 : Select Sum Insured, Enter Date of Birth and pin code of customer. Press “Get Premium”

1 STEP 1 ————— 2 STEP 2

Tell us who would you  
Like to Insure

Select Sum Insured

Cover : ₹2 Lac ▼

Me Dob

25-11-1988 📅

Pincode

PUNJAB AMRITSAR

Previous Get Premium



Step 6 : Premium Amount and total sum insured will reflect on screen.

Please enter customer's complete details



Group Term Insurance

Covered For: 1 Year    Total Premium : ₹650

Brochure (Hindi)    Brochure (English)    Premium Breakup

Sum Insured ₹ 200000

### Insured Details

PERSONAL DETAILS

Salutation	Mr	Full Name	Karan Tandon
Date of Birth	25-11-1988	Mobile	9958539270
Gender	Male	Email ID	krntndn@gmail.com

## Step 7 : Please enter customer's complete address. Enter complete Nominee details

### ADDRESS DETAILS

<input type="text" value="Address 1"/>	21, Ranjit Vihar	<input type="text" value="Address 2"/>	Loharka road
<input type="text" value="State Name"/>	PUNJAB	<input type="text" value="Pincode"/>	143001

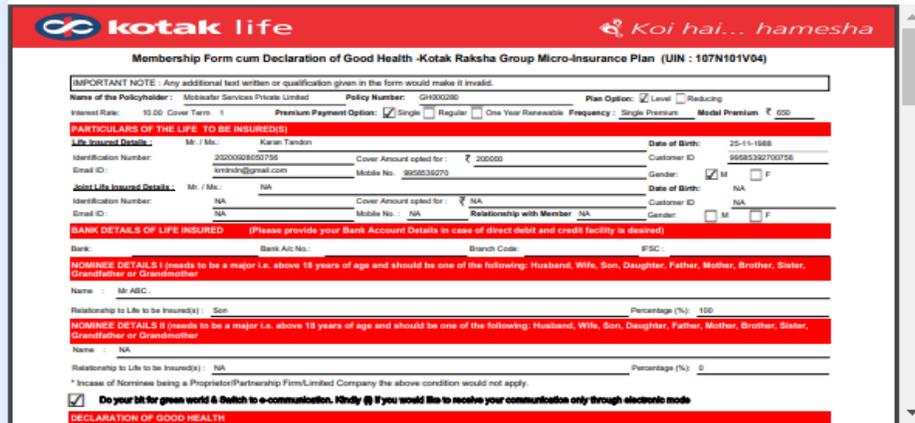
### NOMINEE DETAILS

<input type="text" value="Salutation"/>	Mr.	<input type="text" value="Full Name"/>	ABC
<input type="text" value="Date of Birth"/>	14-09-2002	<input type="text" value="Gender"/>	Male
<input type="text" value="Relation"/>	Son		

Send OTP

Step 8 : Enter OTP received on Customer's mobile number and tick mark the declaration.  
Click on Pay now tab

### Declaration of Good Health



**kotak life** Koi hai... hamesha

Membership Form cum Declaration of Good Health -Kotak Raksha Group Micro-Insurance Plan (UIN : 107N101V04)

**IMPORTANT NOTE** - Any additional text written or qualification given in the form would make it invalid.

Name of the Policyholder : Mobisafar Services Private Limited Policy Number : GH000280 Plan Option :  Level  Reducing  
Interest Rate : 10.00 Cover Term : 1 Premium Payment Option :  Single  Regular  One Year Renewable Frequency : Single Premium Model Premium ₹ 550

**PARTICULARS OF THE LIFE TO BE INSURED(S)**

**Life Insured Details** : Mr./Ms. : Karan Tandon Date of Birth : 25-11-1988  
Identification Number : 2000088050756 Cover Amount opted for : ₹ 200000 Customer ID : 9998332700756  
Email ID : karant@gnail.com Mobile No. : 9928632670 Gender :  M  F

**Joint Life Insured Details** : Mr./Ms. : NA Date of Birth : NA  
Identification Number : NA Cover Amount opted for : NA Customer ID : NA  
Email ID : NA Mobile No. : NA Relationship with Member : NA Gender :  M  F

**BANK DETAILS OF LIFE INSURED** (Please provide your Bank Account Details in case of direct debit and credit facility is desired)  
Bank : Bank A/c No. Branch Code : IFSC :

**NOMINEE DETAILS I** (needs to be a major i.e. above 18 years of age and should be one of the following: Husband, Wife, Son, Daughter, Father, Mother, Brother, Sister, Grandfather or Grandmother)  
Name : Mr ABC  
Relationship to Life to be Insured(X) : Son Percentage (%) : 100

**NOMINEE DETAILS II** (needs to be a major i.e. above 18 years of age and should be one of the following: Husband, Wife, Son, Daughter, Father, Mother, Brother, Sister, Grandfather or Grandmother)  
Name : NA  
Relationship to Life to be Insured(X) : NA Percentage (%) : 0

\* In case of Nominee being a Proprietor/Partnership Firm/Limited Company the above condition would not apply.

Do your bit for green world & Switch to e-communication. **Kindly @ If you would like to receive your communication only through electronic mode**

**DECLARATION OF GOOD HEALTH**

Enter OTP

2412

Resend OTP

- The customer has gone through the contents of declaration of good health and agrees to terms and conditions laid therein.

Pay Now

## Step 8 : Transaction is success and Policy has been generated

Certificate of Insurance


9/28/2020 5:23:26 PM

**KOTAK GROUP SECURE ONE - Certificate Of Insurance**  
(Product UIN: 107N051V03)  
SCHEDULE

Certificate No: GO000002_20200928052229_99994286112229	Member ID: 20200928052229	Member
Name of Master Policyholder:	Demo Client	
Policy No:	GO000002	
Name of the Member:	Mr Rajpal Singh	

Policy No:	GO000002	
Name of the Member:	Mr Rajpal Singh	
Address: B-155 Mobisafar Pvt Ltd Delhi 110055	Sum Assured:	100000
	Premium Amount (Exclusive of Goods and Services Tax and Cess) Rs:	265.00
	Premium Amount (Inclusive of Goods and Services Tax and Cess) Rs:	313.00
	Premium Payment Term:	Annually Renewable
	Cover Term:	1 year (Annually Renewable)
	Member Renewal Date:	29/09/2021

[Print Certificate](#)

THANK YOU

