



5. JOINT APPLICANT DETAILS, If any (contd...) (Refer instruction 4) (In case of Minor, there shall be no joint holders)

2. NAME OF THIRD APPLICANT

Mr. Ms. M/s.

Nationality

PAN# / PEKRN#

KYC# [Please tick (✓)] ☐ Proof Attached (Mandatory)

a. Occupation Details [Please tick (✓)] ☐ Service ☐ Private Sector ☐ Public Sector ☐ Government Service ☐ Student ☐ Professional ☐ Housewife ☐ Business

☐ Retired ☐ Agriculture ☐ Proprietorship ☐ Others (please specify)

b. Gross Annual Income (Rs.) ☐ Below 1 Lac ☐ 1 - 5 Lacs ☐ 5 - 10 Lacs ☐ 10 - 25 Lacs ☐ >25 Lacs - 1 Crore ☐ > 1 Crore OR Net worth Rs.

c. Politically Exposed Person (PEP) Status (Also applicable for authorised signatories/ Promoters/ Karta/ Trustee/ Whole time Directors) ☐ I am PEP ☐ I am Related to PEP ☐ Not Applicable

6. FATCA INFORMATION/ FOREIGN TAX LAWS (for Individual including Sole Proprietor) (Self Certification) (Refer instruction 4)

The below information is required for all applicant(s)/ guardian

Address Type: ☐ Residential or Business ☐ Residential ☐ Business ☐ Registered Office (for address mentioned in form/existing address appearing in Folio)

Is the applicant(s)/ guardian's Country of Birth / Citizenship / Nationality / Tax Residency other than India? ☐ Yes ☐ No

If Yes, please provide the following information [mandatory]

Please indicate all countries in which you are resident for tax purposes and the associated Tax Reference Numbers below.

Category	First Applicant (including Minor)	Second Applicant/ Guardian	Third Applicant
Place/ City of Birth			
Country of Birth			
Country of Tax Residency 1			
Tax Payer Ref. ID No. 1			
Country of Tax Residency 2			
Tax Payer Ref. ID No. 2			
Country of Tax Residency 3			
Tax Payer Ref. ID No. 3			

7. POWER OF ATTORNEY (PoA) HOLDER DETAILS

Name of PoA Mr. Ms. M/s.

PAN# / PEKRN#

KYC# [Please tick (✓)] (Mandatory) ☐ Proof Attached

# Please attach Proof. Refer instruction No 16 for PAN/PEKRN and No 18 for KYC.

8. BANK ACCOUNT DETAILS OF THE FIRST / SOLE APPLICANT (For redemption/ dividend if any) (refer instruction 5) (Mandatory to attach proof, in case the pay-out bank account is different from the bank account mentioned under Section 10 below.)

For unit holders opting to hold units in demat form, please ensure that the bank account linked with the demat account is mentioned here.

Bank Name

Branch Name

Account Number

MICR Code

Account Type (Please ✓) ☐ Savings ☐ Current ☐ NRO ☐ NRE ☐ FCNR ☐ Others (please specify)

IFSC Code\*\*\*

Bank City

(The 9 digit code appears on your cheque next to the cheque number)

\*\*\* Refer Instruction 5C (Mandatory for Credit via NEFT / RTGS) (11 Character code appearing on your cheque leaf. If you do not find this on your cheque leaf, please check for the same with your bank)

9. MODE OF PAYMENT OF REDEMPTION / DIVIDEND PROCEEDS VIA NEFT / ECS / DIRECT CREDIT (refer instruction 11)

Unitholders will receive redemption/ dividend proceeds directly into their bank account (as furnished in Section 8) via Direct credit/ NEFT/ECS facility

☐ I/We want to receive the redemption / dividend proceeds (if any) by way of a demand draft instead of direct credit / credit through NEFT system / credit through ECS into my / our bank account

10. INVESTMENTS & PAYMENT DETAILS [Please (✓)] (refer instruction 6 & 7 for Scheme details and instruction 8 & 9 for Payment Details) The name of the first/ sole applicant must be pre-printed on the cheque.

☐ Regular Plan (Purchase/ Subscription routed through Distributor)  
Mention valid ARN in Key Partner/ Agent Information

☐ Direct Plan (Purchase/ Subscription made directly with the Fund)  
Mention DIRECT in Key Partner/ Agent Information

For Default Plan (viz. Direct / Regular Plan) refer instruction 7.

Scheme/Plan/Sub Option

Payment Type [Please (✓)] ☐ Non-Third Party Payment ☐ Third Party Payment (Please attach 'Third Party Payment Declaration Form')

Cheque/ DD/ Payment Instrument/ UTR No.	Cheque/ DD/ Payment Instrument/ UTR Date	Amount of Cheque / DD / Payment Instrument / RTGS/ NEFT in figures (Rs.)	DD Charges, if any	Net Cheque/ DD Amount	Drawn on Bank / Branch	Pay-In Bank Account No. (For Cheque Only)

Particulars			
Scheme Name / Plan / Option / Sub-option / Payout Option	Cheque / DD / Payment Instrument / UTR No. / Date	Drawn on (Name of Bank and Branch)	Amount in figures (Rs.)

11. UNIT HOLDING OPTION ☐ DEMAT MODE\* ☐ PHYSICAL MODE (Default) (refer instruction 13)

\*Demat Account details are mandatory if the investor wishes to hold the units in Demat Mode

NSDL	DP Name	DP ID	I	N							Beneficiary Account No.										
CDSL	DP Name										Beneficiary Account No.										

\*Investor opting to hold units in demat form, may provide a copy of the DP statement enable us to match the demat details as stated in the application form.

12. NOMINATION (refer instruction 15) (Mandatory for new folios of Individuals where mode of holding is single) (For Units in Non-Demat Form)

[Please (✓) and sign] ☐ I/We do not wish to Nominate

First / Sole Applicant      Second Applicant      Third Applicant  
OR

☐ I/We wish to nominate as under:

Name and Address of Nominee(s)	Date of Birth	Name and Address of Guardian	Signature of Nominee (Optional)/ Guardian of Nominee (Mandatory)	Proportion (%) in which the units will be shared by each Nominee (should aggregate to 100%)
	(to be furnished in case the Nominee is a minor)			
Nominee 1				
Nominee 2				
Nominee 3				

13. DECLARATION & SIGNATURE/S (refer instruction 14)

I/We am/are not prohibited from accessing capital markets under any order/ruling/judgment etc., of any regulation, including SEBI. I/We confirm that my application is in compliance with applicable Indian and foreign laws. I/We hereby confirm and declare as under:-

- (1) I / We have read, understood and hereby agree to comply with the terms and conditions of the scheme related documents and apply for allotment of Units of the Scheme(s) of HDFC Mutual Fund ('Fund') indicated above.
- (2) I/We am/are eligible Investor(s) as per the scheme related documents and am/are authorised to make this investment as per the Constitutive documents/ authorization(s). The amount invested in the Scheme(s) is through legitimate sources only and is not for the purpose of contravention and/or evasion of any act, rules, regulations, notifications or directions issued by any regulatory authority in India.
- (3) The information given in / with this application form is true and correct and further agree to furnish such other further/additional information as may be required by the HDFC Asset Management Company Limited (AMC)/ Fund and undertake to inform the AMC / Fund/Registrars and Transfer Agent (RTA) in writing about any change in the information furnished from time to time.
- (4) That in the event, the above information and/or any part of it is/are found to be false/ untrue/ misleading, I/We will be liable for the consequences arising therefrom.
- (5) I/We hereby authorize you to disclose, share, remit in any form/manner/mode the above information and/or any part of it including the changes/updates that may be provided by me/us to the Mutual Fund, its Sponsor/s, Trustees, Asset Management Company, its employees, agents and third party service providers, SEBI registered intermediaries for single updation/ submission, any Indian or foreign statutory, regulatory, judicial, quasi- judicial authorities/agencies including but not limited to Financial Intelligence Unit-India (FIU-IND) etc without any intimation/advice to me/us.
- (6) I/We will indemnify the Fund, AMC, Trustee, RTA and other intermediaries in case of any dispute regarding the eligibility, validity and authorization of my/our transactions.
- (7) The ARN holder (AMFI registered Distributor) has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him/them for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.
- (8) I/WE HEREBY CONFIRM THAT I/WE HAVE NOT BEEN OFFERED/ COMMUNICATED ANY INDICATIVE PORTFOLIO AND/ OR ANY INDICATIVE YIELD BY THE FUND/AMC/ITS DISTRIBUTOR FOR THIS INVESTMENT.**

For Foreign Nationals Resident in India only:

I/We will redeem my/our entire investment/s before I/We change my/our Indian residency status. I/We shall be fully liable for all consequences (including taxation) arising out of the failure to redeem on account of change in residential status.

For NRIs/ PIO/OCIs only:

I/We confirm that my application is in compliance with applicable Indian and foreign laws.

Please (✓) ☐ Yes ☐ No      If Yes, (✓) ☐ Repatriation basis ☐ Non-repatriation basis

SIGN HERE↻

(Please write Application Form No. / Folio No. on the reverse of the Cheque / Demand Draft / Payment Instrument.)

SIGNATURE(S)

First / Sole  
Applicant /  
Guardian

Second  
Applicant

Third  
Applicant

APPLICATION FORM FOR SIP & FLEX SIP

[For Investments through NACH/ ECS (Debit Clearing)/  
Direct Debit Facility/ Standing Instruction]

Important: Please strike out the Section(s) that is/are not used by you to avoid any unauthorised use



May 2018

Please tick ✓ as applicable:

- ☐ OTM Debit Mandate is already registered in the folio. [No need to submit again]. SIP Auto debit can start in 10 Days i.e. for debit date 15th, form can be submitted till 4th of the month.
- ☐ OTM Debit Mandate is attached and to be registered in the folio. SIP Auto debit will start after mandate registration which takes 10 to 30 days depending on NACH or ECS modalities.

KEY PARTNER / AGENT INFORMATION (Investors applying under Direct Plan must mention "Direct" in ARN column.)

FOR OFFICE USE ONLY (TIME STAMP)

ARN/ RIA Code	ARN/ RIA Name	Sub-Agent's ARN	Bank Branch Code	Internal Code for Sub-Agent/ Employee	Employee Unique Identification Number (EUIIN)
ARN					

EUIN Declaration (only where EUIN box is left blank) (Refer Item No. 2(I)a)

I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/ sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker.

Sign Here	Sign Here	Sign Here
First/ Sole Applicant/ Guardian	Second Applicant	Third Applicant

Transaction Charges for Applications through Distributors only (Refer Item No. 13)

Date: D D M M Y Y Y Y

If the total commitment of investment through SIP (i.e. amount per SIP installment X no. of installments) amounts to Rs.10,000 or more and your Distributor has opted to receive transaction Charges, the same are deductible as applicable from the installment amount and payable to the Distributor. In such cases Transaction Charge will be recoverable in 3-4 installments. Units will be issued against the balance of the installment amounts invested.

Upfront commission shall be paid directly by the investor to the ARN Holder (AMFI registered Distributor) based on the investors' assessment of various factors including the service rendered by the ARN Holder.

Please (✓) any one. In the absence of indication of the option the form is liable to be rejected.

☐ NEW REGISTRATION

☐ CHANGE OTM DEBIT MANDATE (Refer Item No. 3)

☐ CANCELLATION (Refer Item No. 7)

1) INVESTOR DETAILS

Application No. (For new investor)/ Folio No. (For existing Unitholder)

First/ Sole Applicant Details

Mobile No. Email Id

NAME OF FIRST / SOLE APPLICANT Mr. Ms. M/s.

NAME OF THE SECOND APPLICANT Mr. Ms. M/s.

NAME OF THE THIRD APPLICANT Mr. Ms. M/s.

Applicant	PAN/ PEKRN* (Mandatory)	KYC Number	KYC Mandatory	Proof Attached
Sole / First Applicant			<input type="checkbox"/>	<input type="checkbox"/>
Second Applicant			<input type="checkbox"/>	<input type="checkbox"/>
Third Applicant			<input type="checkbox"/>	<input type="checkbox"/>
Guardian/POA Holder			<input type="checkbox"/>	<input type="checkbox"/>

# Please attach Proof. If PAN/PEKRN/KYC is already validated please don't attach any proof. PEKRN mandatory for Micro SIP. Refer Item No. 11 and 12.

NAME OF THE GUARDIAN (In case of minor) / CONTACT PERSON - DESIGNATION (In case of Non-individual Investors)/ PoA HOLDER

Mr. Ms. M/s.

RELATIONSHIP WITH MINOR

AADHAAR DETAILS (Ensure all details are as per Aadhaar Card) (for Individual including Sole Proprietor) Not mandatory for NRIs [Refer Item No. 12 (c)]

Particulars	Aadhaar Number* (Please enclose copy of front & back side)	Date of Birth	PIN Code	Mobile No.	Enrolment Proof#
1st Applicant		D D M M Y Y Y Y			<input type="checkbox"/>
2nd Applicant		D D M M Y Y Y Y			<input type="checkbox"/>
3rd Applicant		D D M M Y Y Y Y			<input type="checkbox"/>
Guardian		D D M M Y Y Y Y			<input type="checkbox"/>
POA		D D M M Y Y Y Y			<input type="checkbox"/>

\* All the applicants whose Aadhaar Number is mentioned are required to sign the form. # If Aadhaar number is applied for, please enclose proof of enrolment.

I/WE WOULD LIKE TO INVEST TO MEET MY/OUR FINANCIAL GOALS (choose anyone (✓) (Refer Item No. 15)

☐ Purchase of Residence ☐ Children's Education ☐ Children's Marriage ☐ Retirement ☐ Others

Target Amount

ACKNOWLEDGEMENT SLIP (To be filled in by the Unit holder)

HDFC MUTUAL FUND

Date: Head Office : HDFC House, 2nd Floor, H.T. Parekh Marg, 165-166, Backbay Reclamation, Churchgate, Mumbai - 400 020.

Application/ Folio No.  
Received from Mr./Ms./M/s.  
Scheme / Plan / Option

SIP application

Scheme 1

Scheme 2

ISC Stamp & Signature

Scheme Name (1)										Plan		Option/Sub-option			
										<input type="checkbox"/> Regular <input type="checkbox"/> Direct					
<b>SIP Installment</b> Amount (₹) _____					<b>Start Month/Year</b> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div>			<b>End Month/Year</b> (Default Dec 2040)* <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div>			<b>SIP Frequency</b> (Please refer Item iii) <input type="checkbox"/> Daily** <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly				
<b>SIP Date (Please (✓) one or more of the following dates)</b> (Please refer Item 5) <div style="display: flex; flex-wrap: wrap; justify-content: space-between;"> <div><input type="checkbox"/> 1st</div> <div><input type="checkbox"/> 2nd</div> <div><input type="checkbox"/> 3rd</div> <div><input type="checkbox"/> 4th</div> <div><input type="checkbox"/> 5th</div> <div><input type="checkbox"/> 6th</div> <div><input type="checkbox"/> 7th</div> <div><input type="checkbox"/> 8th</div> <div><input type="checkbox"/> 9th</div> <div><input type="checkbox"/> 10th*</div> <div><input type="checkbox"/> 11th</div> <div><input type="checkbox"/> 12th</div> <div><input type="checkbox"/> 13th</div> <div><input type="checkbox"/> 14th</div> <div><input type="checkbox"/> 15th</div> <div><input type="checkbox"/> 16th</div> <div><input type="checkbox"/> 17th</div> <div><input type="checkbox"/> 18th</div> <div><input type="checkbox"/> 19th</div> <div><input type="checkbox"/> 20th</div> <div><input type="checkbox"/> 21st</div> <div><input type="checkbox"/> 22nd</div> <div><input type="checkbox"/> 23rd</div> <div><input type="checkbox"/> 24th</div> <div><input type="checkbox"/> 25th</div> <div><input type="checkbox"/> 26th</div> <div><input type="checkbox"/> 27th</div> <div><input type="checkbox"/> 28th</div> <div><input type="checkbox"/> 29th</div> <div><input type="checkbox"/> 30th</div> <div><input type="checkbox"/> 31st</div> </div>															
<input type="checkbox"/> <b>SIP TOP-UP (✓) Not available for Daily SIP</b> Amount (₹) ^ _____ OR <b>Percentage<sup>s</sup> (%)</b> _____ Frequency (✓): <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly* <b>Frequency: Yearly</b>										<b>SIP TOP-UP CAP</b> CAP Amount*: ₹ _____ OR <b>CAP Month-Year*:</b> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div> (Investor has to choose only one option)					
Scheme Name (2)										Plan		Option/Sub-option			
										<input type="checkbox"/> Regular <input type="checkbox"/> Direct					
<b>SIP Installment</b> Amount (₹) _____					<b>Start Month/Year</b> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div>			<b>End Month/Year</b> (Default Dec 2040)* <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div>			<b>SIP Frequency</b> (Please refer Item iii) <input type="checkbox"/> Daily** <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly				
<b>SIP Date (Please (✓) one or more of the following dates)</b> (Please refer Item 5) <div style="display: flex; flex-wrap: wrap; justify-content: space-between;"> <div><input type="checkbox"/> 1st</div> <div><input type="checkbox"/> 2nd</div> <div><input type="checkbox"/> 3rd</div> <div><input type="checkbox"/> 4th</div> <div><input type="checkbox"/> 5th</div> <div><input type="checkbox"/> 6th</div> <div><input type="checkbox"/> 7th</div> <div><input type="checkbox"/> 8th</div> <div><input type="checkbox"/> 9th</div> <div><input type="checkbox"/> 10th*</div> <div><input type="checkbox"/> 11th</div> <div><input type="checkbox"/> 12th</div> <div><input type="checkbox"/> 13th</div> <div><input type="checkbox"/> 14th</div> <div><input type="checkbox"/> 15th</div> <div><input type="checkbox"/> 16th</div> <div><input type="checkbox"/> 17th</div> <div><input type="checkbox"/> 18th</div> <div><input type="checkbox"/> 19th</div> <div><input type="checkbox"/> 20th</div> <div><input type="checkbox"/> 21st</div> <div><input type="checkbox"/> 22nd</div> <div><input type="checkbox"/> 23rd</div> <div><input type="checkbox"/> 24th</div> <div><input type="checkbox"/> 25th</div> <div><input type="checkbox"/> 26th</div> <div><input type="checkbox"/> 27th</div> <div><input type="checkbox"/> 28th</div> <div><input type="checkbox"/> 29th</div> <div><input type="checkbox"/> 30th</div> <div><input type="checkbox"/> 31st</div> </div>															
<input type="checkbox"/> <b>SIP TOP-UP (✓) Not available for Daily SIP</b> Amount (₹) ^ _____ OR <b>Percentage<sup>s</sup> (%)</b> _____ Frequency (✓): <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly* <b>Frequency: Yearly</b>										<b>SIP TOP-UP CAP</b> CAP Amount*: ₹ _____ OR <b>CAP Month-Year*:</b> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">M</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> <div style="border: 1px solid black; padding: 2px;">Y</div> </div> (Investor has to choose only one option)					

**TOP-UP CAP amount:** Please refer Item v (b){1}] **# TOP-UP CAP Month-Year:** Please refer Item v (b){2}]  
**Maximum amount of debit (SIP+Top-up) under direct debit facility for investors with bank accounts with State Bank of India shall not exceed Rs. 5,00,000/- per installment.**  
**First SIP Transaction via Cheque No.**  **Cheque Dated**            **Amount@ (Rs.)**   
**Mandatory Enclosure** (if 1st Installment is not by cheque) ☐ Blank cancelled cheque ☐ Copy of cheque **@The first cheque amount should be same as each/total SIP Amount.**  
The name of the first/ sole applicant must be pre-printed on the cheque.

Scheme Name (1)											Plan		Option/Sub-option		
<b>SIP Installment</b> <b>Amount (₹)</b> _____ <small>Maximum Rs. 1,00,000</small>											<b>SIP Frequency</b> [Please refer Item No. E] <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly		<b>Growth</b> <b>Start Month/Year</b> <div> <div>M</div> <div>M</div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div> </div>		
<b>SIP Date (Please (✓) one or more of the following dates)</b> (Please refer Item No. 5) <div> <input type="checkbox"/> 1st           <input type="checkbox"/> 2nd           <input type="checkbox"/> 3rd           <input type="checkbox"/> 4th           <input type="checkbox"/> 5th           <input type="checkbox"/> 6th           <input type="checkbox"/> 7th           <input type="checkbox"/> 8th           <input type="checkbox"/> 9th           <input type="checkbox"/> 10th*           <input type="checkbox"/> 11th           <input type="checkbox"/> 12th           <input type="checkbox"/> 13th           <input type="checkbox"/> 14th           <input type="checkbox"/> 15th           <input type="checkbox"/> 16th         </div> <div> <input type="checkbox"/> 17th           <input type="checkbox"/> 18th           <input type="checkbox"/> 19th           <input type="checkbox"/> 20th           <input type="checkbox"/> 21st           <input type="checkbox"/> 22nd           <input type="checkbox"/> 23rd           <input type="checkbox"/> 24th           <input type="checkbox"/> 25th           <input type="checkbox"/> 26th           <input type="checkbox"/> 27th           <input type="checkbox"/> 28th           <input type="checkbox"/> 29th           <input type="checkbox"/> 30th           <input type="checkbox"/> 31st         </div>															
<b>Tenure of SIP - Please (✓)</b> (Please refer Item No. D) <input type="checkbox"/> 3 Years <input type="checkbox"/> 5 Years* <input type="checkbox"/> 10 Years <input type="checkbox"/> 15 Years <input type="checkbox"/> 20 Years															
Scheme Name (2)											Plan		Option/Sub-option		
<b>SIP Installment</b> <b>Amount (₹)</b> _____ <small>Maximum Rs. 1,00,000</small>											<b>SIP Frequency</b> [Please refer Item No. E] <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly		<b>Growth</b> <b>Start Month/Year</b> <div> <div>M</div> <div>M</div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div> </div>		
<b>SIP Date (Please (✓) one or more of the following dates)</b> (Please refer Item No. 5) <div> <input type="checkbox"/> 1st           <input type="checkbox"/> 2nd           <input type="checkbox"/> 3rd           <input type="checkbox"/> 4th           <input type="checkbox"/> 5th           <input type="checkbox"/> 6th           <input type="checkbox"/> 7th           <input type="checkbox"/> 8th           <input type="checkbox"/> 9th           <input type="checkbox"/> 10th*           <input type="checkbox"/> 11th           <input type="checkbox"/> 12th           <input type="checkbox"/> 13th           <input type="checkbox"/> 14th           <input type="checkbox"/> 15th           <input type="checkbox"/> 16th         </div> <div> <input type="checkbox"/> 17th           <input type="checkbox"/> 18th           <input type="checkbox"/> 19th           <input type="checkbox"/> 20th           <input type="checkbox"/> 21st           <input type="checkbox"/> 22nd           <input type="checkbox"/> 23rd           <input type="checkbox"/> 24th           <input type="checkbox"/> 25th           <input type="checkbox"/> 26th           <input type="checkbox"/> 27th           <input type="checkbox"/> 28th           <input type="checkbox"/> 29th           <input type="checkbox"/> 30th           <input type="checkbox"/> 31st         </div>															
<b>Tenure of SIP - Please (✓)</b> (Please refer Item No. D) <input type="checkbox"/> 3 Years <input type="checkbox"/> 5 Years* <input type="checkbox"/> 10 Years <input type="checkbox"/> 15 Years <input type="checkbox"/> 20 Years															

**First SIP Transaction via Cheque No.**  **Cheque Dated**

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

**Amount (Rs.)**

**Mandatory Enclosure** (if 1st Installment is not by cheque) ☐ Blank cancelled cheque ☐ Copy of cheque

The name of the first/ sole applicant must be pre-printed on the cheque.

## OTM Bank Details to be debited for the SIP (OTM already Registered)

**NOTE:** In case the OTM is not registered, please fill in the attached OTM Debit Mandate.

(refer instruction 6)

\*Investor opting to hold units in demat form, may provide a copy of the DP statement enable us to match the demat details as stated in the application form.

The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him/them for the different competing Schemes of various mutual Funds from amongst which the Scheme is being recommended to me/us.

**Please note: Signature(s) should be as it appears in the folio/ on the Application Form and in the same order.  
In case the mode of holding is joint, all Unit holders are required to sign.**

