# COMMON APPLICATION FORM



									Application No.
Ref. Instruction No. 9 ARN Declaration - Upfront commission	n shall be paid directly by th	e investor to the AMFI req	istered Distributors b	based on the inves	tors assessment	of various factors ir	Icluding the serv	ice rendered by the	distributor.
EXISTING UNIT HOLDER I		-					-		
Folio No.									
UNIT HOLDER INFORMATIO		Fresh / New Investors fill in	all the blocks. (2 to 12	2)					
NAME OF FIRST / SOLE APPLICA Mr. Ms. M/s.	NT							Date of Birth	
NAME OF SECOND APPLICANT								Date of Dirti	
Mr. Ms. M/s.								MODE O	HOLDING [Please tick ()]
NAME OF THIRD APPLICANT Mr. Ms. M/s.								Joint	Single or Survivor (Default option is Anyone
NAME OF THE GUARDIAN (In case of	f minor) / CONTACT PERS	ON - DESIGNATION /	<b>PoA HOLDER</b> (In c	ase of Non-individua	I Investors)				Con Convivor (Detault option is Anyone
Mr. Ms. M/s.									
MAILING ADDRESS OF FIRST	/ SOLE APPLICANT	(P.O.Box Address is not s	ufficient. Please prov	ide full address.) (	Indian Address in	case of NRIs/FIIs)			
CITY			STATE					Р	N CODE
				<b>71</b>				/	Important Note:
CONTACT DETAILS OF FIRST / S ISD CODE	OULE APPLICANT / CU	TEL: OFF.			Investors)			the second secon	Please ensure that yo
TEL: RESI S T			MOBILE						your phone number an address correctly. Here
ONLINE ACCESS** (this enables you		lie through our website way		Yes	No	[Please tick (√)]			Keep an eye on your
	to access your investment portion	nio through our website - ww	w.binasuniire.com)	165		[Fiedse lick (7)]			We will send you
E-MAIL (Refer Instruction No. 10)									ment status • Early Bird adv b know about our new
								een: Stay free o	
Overseas Address (For NRIs/	FIIS) (For NRI / FII applica	tion in addition to mailing	address above)						
	CITY					S	TATE		
COUNTRY								P	N CODE
MANDATORY [Please tick ()]	Refer Instruction No. 2, 3 & 4)	(NOT APPLICABL	E FOR MICRO	SIP)					
APPLICANT DETAILS		*Please attach proof			Client (KYC)	)		S	TATUS
FIRST APPLICANT			Proof		Complied	Residen	t Individual	Fils	🗌 NRI - NRO
SECOND APPLICANT			Proof		- F	🗌 HUF		🗌 Club / Sc	ciety DIO
THIRD APPLICANT					•	Body Co		Minor	
GUARDIAN / POA HOLDER					•	Sole Pro		Partners (Please S	
OCCUPATION [Please tick ()]									
Professional House	wife 🗌 Business	Service	Retired	Student		ease Specify)			
						(use openity)			
COMMUNICATION [Please tick	<ul><li>(✓)] (Refer Instruction No. 10)</li></ul>								
I/We wish to receive the follow			vsical mode		ccount Stater	ment	Annual	Report	Other Statutory Informat
CKNOWLEDGEMENT SLIP (T	o be filled <u>in by the Investo</u>	or) COM	IMON APPLIC	ATION FORM			<del>~~</del>		Application No.
(		a Sun Life				Omnan	vlimi	ted	
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				•		•	-	400.012	
Birla Sun Life Mutual Fund	One India	Bulls Centre , Tower 1, 1	17th Floor, Jupiter Mi	ill Compound, 841	1, Senapati Bapat	t Marg, Elphinstone	Road, Mumbai	Г	Collection Centre / AMC Stamp & Signature

🗌 Board / Committee Resolution / Authority Letter 🔄 Memorandum & Articles of Association 📄 Trust Deed 📄 Partnership Deed 📄 Bye-laws 📄 Overseas Auditor's certificate  $\hfill\square$  List of Authorised Signatories with names, designations & specimen signature

7.	BANK ACCOUNT DETAILS (Please note that as per SEBI Regulations it is mandatory for investors to provide their bank account details) Refer Instruction No. 3	
	Name of the Bank	
	Branch Address	
	City Pin Code Account No.	
	Account Type [Please tick (/)] SAVINGS CURRENT NRE NRO FCNR OTHERS	MICR CODE
	IFSC CODE / RTGS CODE	This is a 9 digit number next to your Cheque Number. Please attach an extra blank cancelled cheque or a clear photocopy of a cheque

### 8. INVESTMENT DETAILS [Please tick (~)] (Refer Instruction No. 16)

Separate cheque / demand draft must be issued for each investment, drawn in favour of respective scheme name. Please write appropriate scheme name as well as the Plan / Option / Sub Option.

S.	*Cheque / DD Favouring	Plan / Option	Sweep to	Amount	DD	Net Amount	Pay	ment Details	Type of
No.	Scheme Name (refer Instruction 5)		(applicable only for Dividend option)	Invested (Rs.)	Charges	Paid (Rs.)	Cheque / DD No.	Bank and Branch	Account #
1			Scheme Name						
1.			Plan / Option						
2.			Scheme Name						
۷.			Plan / Option						]
3.			Scheme Name						
5.			Plan / Option						
1			Scheme Name						
4.			Plan / Option						

# (Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR) \*All purchases are subject to realization of cheque/DD

#### 9. REDEMPTION / DIVIDEND REMITTANCE Please attach a copy of cancelled cheque Refer Instruction No. 8 & 14

DIRECT CREDIT AVAILABLE IN BANK ACCOUNT	REAL TIME GROSS SETTLEMENT (RTGS) (FOR REDEMPTIONS ONLY)						
Unitholders having bank account with ABN AMRO Bank, Citi Bank, Deutsche Bank, HDFC Bank, HSBC Bank, ICICI Bank, IDBI Bank, Standard Chartered Bank, Axis Bank, Kotak Mahindra Bank, Yes	I/We request you to activate Real Time Gross Settlement (RTGS) facility for my folio and remit the redemption proceeds through RTGS (Refer Instruction No. 14)						
Bank, State Bank of India & Punjab National Bank will receive their Redemption / Dividend Payments (if any) directly into their bank account.	$\label{eq:please tick (/)} \blacksquare \ Yes \ \blacksquare \ No \ (\text{If Yes, please fill the IFSC Code})$						
In case Unitholders wish to receive a cheque (instead of a direct credit into their bank account), please indicate the preference below:	IFSC CODE						
I/We want to receive the redemption and dividend proceeds (if any) by way of a cheque. [Please tick (<)] Yes No	It is the responsibility of the Investor to ensure the correctness of the IFSC code of the recipient / destination branch corresponding to the Bank details mentioned in Section 7.						
ELECTRONIC CLEARING SERVICE (ECS) (FOR DIVIDENDS ONLY)							

I authorise Birla Sun Life Mutual Fund to credit my dividend payments through ECS [Please tick (<)] 🗌 Yes 🗌 No

10. NOMINATION DETAILS (Refer Instruction No. 7) In case of multiple nominees - more than 1 up to 3 - fill a separate nomination form available in this booklet or on our website (www.birlasunlife.com)

I/We do hereby nominate the undermentioned Nominee to receive the units to my / our credit in this folio no. in the event of my / our death. I / We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the AMC / Mutual Fund / Trustees.

Nominee Name :			Date Of Birth (in ca	se of minor): / /
Relationship :	_ Guardian / Parent Name (in case of minor):			
Address :				
Witness Name:		Address :		Signature of Nominee or Parent / Guardian

I have attached the nomination details separately with this application form (Please tick if applicable)

#### 11. DECLARATION(S) & SIGNATURE(S) (Refer Instruction No. 1)

Signature of the Witness

To, The Trustee, Birla Sun Life Mutual Fund Having read and understood the contents of the Statement of Additional Information / Scheme Information Document of the Scheme, I/We hereby apply for units of the scheme and agree to abide by the terms, conditions, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate sources only and does not involve and is not designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the government of India from time to time. I/We have understood the details of the scheme & Viwe have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment. For MIIs only: I/We confirm that I arrive are Non Residents of Indian Nationality/Ongin and that I/we have remitted funds from abroad through approved banking channels or from funds in my/our Non-Resident External /Non-Resident Ordinary /FOR account. (Refer Inst. No. 6) I/We confirm that details provided by me/us are frue and correct. \*\*\* Thave outhariny subscribed to the on-line access for transacting through the internet facility meritoned on the website www.birtasunific.com and hereby undertake to be bound by the same. I further undertake to discharge the Abilgations cast on me and shall not at any time deny or repudiate the on-line transactions effected by me and I shall be solely liable for all the costs and consequences thereof. The ABN holder has disclosed to me/us.

First Applicant / Authorised Signatory

Signature

Second Applicant

Third Applican

S.	Scheme Name	Plan / Option	Swe	ep to	Net Amount	Payment Details		
No.	Scheme Name	Fiail / Uption	(applicable only fo	or Dividend option)	Paid (Rs.)	Cheque / DD No.	Bank and Branch	
1.			Scheme Name	Plan / Option				
2.			Scheme Name	Plan / Option				
3.			Scheme Name	Plan / Option				
4.			Scheme Name	Plan / Option				

# SIP APPLICATION FORM (to be filled & submitted with Common Application Form)

Micro SIP (Refer Instruction D-27) SIP



bit Burnardia Burnardia   Bernardia New Agrication No.   Bernardia New Agrication No.   Demonstration New Agrication No.   Demonstration New Agrication No.   AME OF FREST, SOLE APPLICANT Ne. No.   AME OF THE SCOLD APPLICANT New New New Agrication No.   Second Agrication No. New Agrication No.   AME OF THE SCOLD APPLICANT No. No.   AME OF THE SCOLD APPLICANT No. No.   Second Agrication No. New Agrication No.   Second Agrication No. New New New Agrication No.   Second Agrication No. New New New Agrication No.   Second Agrication No. New	Investment Advisor's Name & ARN						Sub-Broker's Name & ARN			& Sign Offic	cial Ad		ce Poir	t	Date			M M Y Y Y Request for		
Existing investor Fide Na.					nvestorto	the AMFI rec	aistered Distribut	ors based on the	investors asse	essment of v	arious fa	actors inclu	idina the se	ervice rende	red by th	ne distri	ibutor.		•	
APPLICATING       Monitorial       Image: Monitorial State														a vice i ciride	loubya	10 0100	ibutoi.			
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AME OF THE CUARDAN       No: No: No:         (in case of Part / Sub Applicant is Not / CONTACT FERSION - DESIGNATION (In case of non-trickvicial Investor)       Reference / Mentilication No: Not / Not	AME OF THE SECOND APPLIC	CANT	Mr. Ms.	M/s.																
	AME OF THE THIRD APPLICA	NT	Mr. Ms.	M/s.																
Applicant       PMP       Montactory is 2P       Cumpled       Date of barin       Reference / Meetification Re. Advacury is Vices Sife rate is accounts of Sife rate is account of Sife rate	AME OF THE GUARDIAN ^		Mr. Ms.	M/s.																
	(in case of First / Sole Applican	nt is a Mi	nor) / <b>CO</b>	NTACT P	PERSON	I – DESIGI		e of non-indiv	idual Investo	rs)										
Second Applicant Inited	Applicant		PAN	* (Mandator	y for SIP)		KYC Complied		Date of bir	th		Reference	e / Identif	cation No.(	Mandator	y for Mi	cro SIP, n	ot for addi	tional Micro	SIP in s
Third Applicant       Image: Control of Control	Sole / First Applicant							DDI	Y M N	Y Y	Y									
Guardian       0       0       M & U V V V       V         Document submitted for Micro SIP :	Second Applicant										Y									
Net Harbacken No. D-21  Document submitted for Micro SIP :  SYSTEMATIC INVESTMENT PLAN (SIP)  Scheme PLAN OPTION  WEEP T0 (net Handadam D-20) SCHEME PLAN OPTION  Hist Denouse Data D D D D D D D D D D D D D D D D D D	Third Applicant							D D I	Y M N	Y Y	Y									
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SCHEME     PLN     OPTION       SWEEP T0 (rite instruction D-20)     SCHEME     PLAN / OPTION       SWEEP T0 (rite instruction D-20)     SCHEME     PLAN / OPTION       First Installment has to be through Cheque / DD.     Ist SIP Cheque / DD.     Ist SIP Cheque / DD.     Ist SIP Cheque / DD.       SiP Start Date     O     M     Y     Y     SIP Date (pay one ase)     Ist      7 m     10m     14m     20m     21st       Sign Start Date     O     M     Y     Y     SIP Date (pay one ase)     1st      7 m     10m     14m     20m     21st       Sign Start Date     O     M     Y     Y     SIP Date (pay one ase)     1st      7 m     10m     14m     20m     21st       Sign Start Date     O     M     Y     Y     SIP Date (pay one ase)     1st      7 m     10m     14m     20m     21st       Sign Start Date     O     M     Y     Y     SIP Date (pay one ase)     1st      7 m     10m     14m     20m     21st       Each SP Amount (Rs)     Ret Instruction No. 0-26     Ret In	Document submitted for N	Vicro S	IP :																	
SWEEP T0 (rst installinent has to be through Cheque / DD.       1 st SIP Cheque / DD No.       1 st Cheque Dated       0 / / M / / Y /         Drawn on Bank       Amount (Rs), (nt gues)       1 st SIP Cheque / DD No.       1 st Cheque Dated       0 / / M // Y /         SIP Start Date       0 / M // Y / Y SIP End Date       0 / / M // Y /       SIP Date (Nor, ore case)       1 st () 7 h () 10h () 14h () 20h () 21st         Frequency [Please tick (//)       MONTHLY (max 4SIP dates in a months)       OULARTERLY (Outy one date)         Each SIP Amount (Rs),       ret .nstruction No. 0.26         ECS DEBIT BANK ACCOUNT DETAILS (mAwontreny)       Mancount (No.         Name of Stank       Branch         Chy       Pin Code       Account No.         Account No.       Chy on the start data with the start broad service provider to detain the matching cases mytor unitigence to manch by on Chegue with no trace on the start data with the start broad service provider to detain the matching cases mytor unitigence to manch by on Chegue with no trace on the start data with the start broads with any light or mgalary registerers. (W month cases give a chase and manch chegue and the start chematister and provider to matching transching montal with the Streme is and million to manch start the start chematister and with the Streme is and matching transching montal with the Streme is and million transching montal with the Streme is and matching transching montal with the Streme is and matching transching montal with the Streme is and matching transching montal with the Streme is and manch chematister on the start montal with the Str	SYSTEMATIC INVESTM	1ENT F	PLAN (S	SIP)																
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Perequency [Please tick (v)] MONTHLY (mox 4 SIP dates in a months) UUARTERLY (moy one date) Each SIP Amount (Rs.) Ref. Instruction No. D-26 ECS DEBT BANK ACCOUNT DETAILS (maxinatorny) Name of 1 st Applicant as in Bank Records Name of Bank City Pin Code Account No. Account Type [Please tick (v)] SAVINGS UCURRENT OTHERS (please specify) MCR CODE This is a 9 digit memory of the auto date process or for compliance of the auto bath account type (Steese specify) MCR CODE This is a 9 digit memory of the auto date process or for compliance of the auto date process or for the auto date process or for compliance of the auto date process or for the auto date process or for the auto date process or for the auto date process or the compliance of the auto dat																				
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Name of Bank       Branch         City       Pin Code       Account No.         Account Type [Please tick (/)]       SAVINGS       CURRENT       OTHERS       (please specify)       MICR CODE       This is a 9 digit nur met to your Chegu         Whereby authorise Bids Sun Life Mulual Fund and thrie authorised service to death the above bank account by ECS Debt Clearing for compliance with any kegal or regulatory requirements. We will not hold response to the time table or more sort of compliance with any kegal or regulatory requirements. We will also inform, about any changes in my bank account immediately. We have read and the terms and conditions method or or diffected at all reasons of incomplete information. We will not hold response to various Mutual Ends from anongst which the Scheme is being recommended or Micro SIP only: here by deciser that I do not have any existing Micro SIPs which together with the current application in rolling 12 month period or infinancial year is. April to March will result in aggregate investment is being recommended or Micro SIP only: here by deciser that I do not have any existing Micro SIPs which together with the current application in noting 12 month period or infinancial year is. April to March will result in aggregate investment is being recommended or Micro SIP only: here by deciser that I do not have any existing Micro SIPs which together with the current application to mole. Specific terms and and the authorized terms any other mode). papelies to inform that We authorize the representative carrying this ECS mandate Form orget truefield & excuted. Mandate verification charges if any, may be charged to my our account Bank Account Holder       Name of Third Account Holder         Name of First Account Holder       Name of Second Account Holde	requency [Please tick (✓)]			Y Y nax 4 SIP da			QUARTER	RLY (Only one o		SIP Date (0	Only one	_			10th		14th	20	th   🛄 2	21st   [
City       Pin Code       Account No.         Account Type [Please tick (<)]	Frequency [Please tick ()] Each SIP Amount (Rs.)		NTHLY (m		ates in a i		QUARTER	RLY (Only one o		SIP Date (0	Only one	_			10th		14th	20	th   2	21st   [
Account Type [Please tick (/)]   SAVINGS   CURRENT   OTHES (please specify) MICR CODE This is a 9 digit nur ext to your Offenance with any legal or regulatory regularements. We hereby declare that the information provided to the provider to debit the above bank account by ECS behi Clearing for collection of SIP payments. We understand that the information provided by mells were and and their authorised service provider to debit the above bank account by ECS behi Clearing for collection of SIP payments. We understand that the information provided by mells were and and their authorised service provider to debit the above bank account by ECS behi Clearing for collection of SIP payments. We understand that the information provided by mells were and and their authorised service provider to debit the above bank account by ECS behi Clearing for collection of SIP payments. We near charge payment is also inform, about any changes in my bank account immediately. We have registered or not provide to infinancial year i.e. April to March will result in aggregate investments exceeding Rs. 50,000 in any or officer SIP only here of a part and their authorises the regreson fail or officer of Payment in the Scheme is being recommended or infinancial year i.e. April to March will result in aggregate investments exceeding Rs. 50,000 in any officer SIP only here of a part and the information provided to my form and their authorise the regreson at a part applicant in colling 12 month period or infinancial year i.e. April to March will result in aggregate investments exceeding Rs. 50,000 in a second their only to be above and exceeded their advices the regreson at a control with the current application in colling 12 month period or infinancial year i.e. April to March will result in aggregate investments exceeding Rs. 50,000 in a second their only to be account with the current application in colling 12 month period or infinancial year i.e. April to March and the oregenent and a present and exceed their only to be account wit	requency [Please tick (✓)] Each SIP Amount (Rs.)	UNT D	NTHLY (m E <b>TAILS</b>		ates in a i		QUARTER	RLY (Only one o		SIP Date (0	Only one	_			10th		14th	20	th   _ 2	21st   [
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arties for facilitating transaction processing for the auto debit process or for compliance with any legal or regulatory requirements. We hereby declare that the particulars given above are correct and express my/our willingness to make payment be through a transponsible. We will not hold responsible. We will also hinform, about any changes in my bark account immediately. We have read and be the most of incomplete information. We will not hold responsible. We will also hinform, about any changes in my bark account immediately. We have read and the terms and conditions mentioned overleat. The transaction of the antibaction in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer SIP only there by declare that I do not have any existing Micro SIPs which together with the current application in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. April to March will result in aggregate investment exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. April to March will result in aggregate investments exceeding Rs. 50,000 in a y offer start applicant in rolling 12 month period or in financial year ie. Applicant is finde of operation is Joint) (As in Bank Account Molder / Third Applicants is Joint) (As in Bank Account Molder / Third Account Holder / Third Account Holder / Third Account Hol	Frequency [Please tick (✓)] Each SIP Amount (Rs.) ECS DEBIT BANK ACCOU Name of 1st Applicant as in Ban Name of Bank	UNT D	NTHLY (m E <b>TAILS</b>		ates in a i			RLY (Only one o			Branc	date)			10th		14th	20	th   2	21st   [
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Received from Mr. / Ms.

Date : \_\_\_\_/\_\_\_ /

#### SIP THROUGH ECS FACILITY : TERMS & CONDITIONS (SIP PAYMENT THROUGH ELECTRONIC CLEARING SERVICE OF THE RESERVE BANK OF INDIA)

#### [A. LIST OF CITIES FOR SIP THROUGH ECS]\*\*

Delhi, Ludhiana, Amritsar, Jalandhar, Chandioarh, Shimla, Jammu, Kanpur, Allahabad, Varansi, Lucknow, Dehradun, Gorakhpur, Aora, Jaipur, Bhilwara, Udaipur, Jodhour, Raikot, Jamnaoar, Ahmedabad, Baroda, Surat, Mumbai, Goa, Pune, Sholapur, Kolhapur, Nasik, Aurangabad, Nagpur, Indore, Bhopal, Gwalior, Jabalpur, Raipur, Ananauau, varansi, Luckriow, Denradun, Goraknpur, Agra, Jaipur, Bhilwara, Udalpur, Jodhpur, Rajkot, Jamnagar, Ahmedabad, Baroda, Surat, Mumbai, Goa, Pune, Sholapur, Kolhapur, Nasik, Aurangabad, Nagpur, Indore, Bhopal, Gwalior, Jabalpur, Raipur, Hyderabad, Tirupati, Vijaywada, Nellore, Vizag, Kakinada, Bangalore, Mysore, Mangalore, Udipi, Hubli, Gadag, Bijapur, Belgaum, Davangere, Shimoga, Turnkur, Mandya Gulbarga, Chennai, Pondicherry, Trichy, Madurai, Salem, Erode, Thirupur, Calicut, Trichur, Cochin, Trivandrum, Coimbatore, Kolkata, Bardhaman, Durgapur, Siliguri, Bhubaneshwar, Guwahati, Patna, Dhanbad, Jamshedpur, Ranchi, Haldia, Asansol Cuttack \* (subject to revisions in dates and locations offered

#### [B. LIST OF BANKS FOR SIP THROUGH AUTO DEBIT]\*\*

PunjabNational Bank (All branches under core banking), Bank of Baroda (All branches under core banking), Union Bank of India (All branches under core banking), Bank of India (All brances under core banking), IDBI (All Branches), HDFC (All Branches), Axis Bank (All Branches), IndusInd Bank (All Branches), ICICI Bank (All Branches), Kotak Bank (All Branches) \*\*(subject to revisions in dates and locations offered)

#### C. SCHEMES AVAILABLE UNDER SIP

Birla Sun Life Advantage Fund / Birla Sun Life Dividend Yield Plus / Birla Sun Life Tax Plan\* / Birla Sun Life India Opportunities Fund / Birla Sun Life MNC Fund / Birla Sun Life Midcap Fund / Birla Sun Life India GenNext Fund / Birla Sun Life Faulty Fund / Birla Sun Life India Opportunities Fund / Birla Sun Life Midcap Fund / Birla Sun Life India GenNext Fund / Birla Sun Life Frontline Equity Fund / Birla Sun Life India Sun Life India Sun Life India Sun Life India Sun Life Frontline Equity Fund / Birla Sun Life Tax Relief '96\* /Birla Sun Life Commodity Equities Fund / Birla Sun Life India Sun Life New Millennium Fund / Birla Sun Life India Sun Life India Fund / Birla Sun Life India Sun

### # An open-end income Scheme. Monthly income is not assured and is subject to availability of distributable surplus. \*An Open ended Equity Linked Savings Scheme(ELSS) (All investments in the scheme are subject to a lock-in period of 3 years from the date of allotment)

## **D. INSTRUCTIONS**

General Instructions

- New investors who wish to enroll for SIP should fill this form in addition to the Common Application Form. Please quote the application number of the Common Application Form on this SIP Form. Details of the SIP should be provided on this form. Both Forms should be submitted together. Single scheme is allowed per application. For multiple transactions, please fill separate forms with first purchase cheque.
- Existing investors needs to fill up only this form and first purchase cheque with existing folio details 2
- This facility is offered to the investors having bank account in selected cities mentioned above.
- The cities in the list may be modified/updated/changed/removed at any time in future entries at the discretion of Birla Sun Life Mutual Fund without assigning any reasons or prior notice if any city is removed, SIP instruction for investors in such cities via ECS (Debit) route will be discontinued without prior notice. The name of the bank provided for ECS (Debit) should participate in local MICR clearing. 4
- The investor hereby agrees to abide by the terms and conditions of ECS facility of Reserve Bank of India (RBI)
- SIP form should be submitted 30 days before the first Debit through ECS.

#### Mandate rv Details

- Investors should mandatory give a cheque for the first SIP transaction drawn on the same bank account, which is to be registered for ECS (Auto Debit). Initial investment amount and subsequent sip amount should be same. Investor should provide 9 digit MICR code for ECS transaction and complete bank address for SIP auto debit transactions.
- 10. MICR starting with 000 and end with 000 will not be acceptable for ECS transactions

#### **Default Details**

- Default Dates: In case of any ambiguity in selection of investment frequency, the SIP date will be 7 of each month / quarter. In case where more than 4 dates are specified, default dates will be 7, 14, 21 & 28 of each month In case the 'End Date' is not mentioned by the investor in the ECS Facility Form, the same would be considered as 31st 11 12.
- December, 2025 by default 13. Minimum Amount
- Al For Monthly SIP : (i) Birla Sun Life Tax Plan\* and Birla Sun Life Tax Relief '96\*: Minimum 6 installments ^ of Rs. 500/-
- (ii) Other Schemes: Minimum 6 installments ^ of Rs. 1,000/-each and above.
   B) For Quarterly SIP : (i) Birla Sun Life Tax Plan and Birla Sun Life Tax Relief '96: Minimum 4 installments ^ of Rs. 500/-
- ich and above.
- (ii) Other Schemes: Minimum 4 installments ^ of Rs. 2.000/- each and above.

- (ii) Unter Schemes: Minimum 4 Instalments \*\* 014s.2,000/-each and above. (including the first installment) The amount of first purchase and subsequent SIP amounts should be same. Allotment of Units Units will be Allotted at the NAV related prices of the 1st and/or 7th and/or 10th and/or 14th and/or 20th and/or 21st and/or 21st and/or 28th of every month (or next business day, if 1st and/or 7th and/or 10th and/or 14th and/or 20th and/or 21st and/or 28th of every month (or next business day, if 1st and/or 7th and/or 10th and/or 14th and/or 20th and/or 21st and/or 28th is a non business day). An account statement will be dispatched to the unit holders once every quarter within 10 working days of the end of each quarter. The first account statement will be issued within 10 working days of the initial investment tags of une end of each quarter. The mist account statement will be subd what if or working days of une mula investment. Further an updated account statement will be sent after each transaction under the special products wherever, e-mail address has been provided, the account statement will be sent through e-mail only. Fast Forward Facility: Investors can opt for multiple dates within a month in case of monthly SIP Investors may choose maximum upto 4 dates from the following dates: 1st and/or 7th and/or 10th and/or 10th and/or 20th and/or 21st and/or 1st and/or 1st
- 15. 28th of every month.
- 16 Change of Amount
- Investors can change the SIP amount by submitting the following documents 30 working days before the next ECS debit

a) A new 'SIP through ECS Facility' Form with revised SIP amount details.

- b) Letter to discontinue the existing SIF Change of Bank 17.
- In order to change the existing bank account for ECS/SIP Auto Debit investors need to submit following documents 30 working days before the next SIP debit a) A new 'SIP through EQS Facility' Form with Change of bank details and cancelled cheque of new bank. b) Letter to discontinue the existing SIP Discontinue / Cancellation of SIP

- The investor has the right to discontinue SIP at any time he/she so desires by sending a written request 30 working days in advance of the immediate next due date to any of the offices of Birla Sun Life Mutual Fund or its Authorized Collection Centres. On receipt of such request SIP will be terminated. 19
- Conversion of PDC facility in the ECS/ Auto debit Facility Investor with existing SIP facility through Post Dated Cheques can also avail of this facility by submitting the following documents 30 days before the next ECS Debit date : a) SIP through ECS Facility Form along with one mandatory cheque.

  - b) Letter requesting to cancel the existing SIP through PDCs and for returning all the remaining PDCs. Disclaimer

an application for SYSTEMATIC INVESTMENT PLAN THROUGH ECS FACILITY / MICRO SIP

- 20 1. Investors will not hold Birla Sun Life Mutual Fund, its Registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of ECS. 2.Birla Sun Life Mutual Fund, its Registrars and other service providers shall not be responsible and liable for any
  - damages/compensation for any loss, damage etc. incurred by the investor. The investor assumes the entire risk of using this facility and takes full responsibility.
- 21
- and team and the found reserves the right to reject any application without assigning any reason thereof. 3 Birds Out Life Mutual Fund reserves the right to reject any application without assigning any reason thereof. It is compulsory for all investors to quote their Permanent Account Number (PAN) and submit copy of the PAN card issued by the Income Tax Department, irrespective of the amount of investment, while making an application for Purchase of Units. In case of joint applicants, PAN details of all holders should be submitted. In case the investor making the application

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is a minor. PAN details of the Guardian must be submitted. Investors residing in the state of Sikkim are exempt from the Is a minor, rAN details of the Guardian must be submitted. Investors resoling in the state of sixkim are exempt from the mandatory requirement of PAN proof submission, howevers regificient documentary evidence shall have to be submitted to Birla Sun Life Mutual Fund for verifying that they are residents of State of Sixkim. Investors (being individuals) applying for Micro SIP registrations are exempt from mandatory requirement of PAN submission. For further details on Micro SIP documents required to please refer instructions (0-27) in SIP Application Form. DIRECT APPLICATIONS : Investors should ensure to write the word 'DIRECT' in the column 'ARN Nor or Broker Code' in

- Direct APPLICATIONS Investors should ensure to write the word Direct in the column ANN No to Block Code their applications for purchases/additional purchases/writehes/fresh Systematic Investment Plans (SIP)/ fresh Systematic Transfer Plans (STP) in all such cases where applications are not routed through any distributor/agent/broker. In cases where unit holder uses a pre-printed transaction slip/application form where details in the 4NN No' or Broker Code' column is already printed, unit holder should cancel the ARN No/ Broker Code, write 'DIRECT' in the said column . It should also be counter signed by the unit holder / all joint holder (S). Transactions slips/application forms where the column under /ARN No or 'Broker Code' is provided, has to be filled by the unit holder as 'DIRECT' for processing the same as Direct applications in under ARN to be solved to be solved to a solved the application does and buckers for the SIM for the applications. Investors can submit their applications for purchases /additional purchases/ switches/fresh SIP/ fresh STP at
- applications. Investors can submit the applications for purchases/additional purchases/switches/intestors/integtors/integ Fund, Birla Sun Life Income Fund, Birla Sun Life Income Plus, Birla Sun Life Cash Manager, Birla Sun Life Gilt Plus, Birla Sun Life Government Securities Fund, Birla Sun Life Dynamic Bond Fund, Birla Sun Life Medium Term Plan, Birla Sun Life Line Government Securities Fund, bina Sun Line Uynamic bond rund, bina Sun Line Weinum Term Pina, bina Sun Line Weinum Term Pina, bina Sun Line Weinum Term Pina, bina Sun Line Weinum Securities Fund. In case the investor fails to specify his preference of Option/Facility for the scheme into which the dividend has to be sweeped, Growth option under the respective Scheme/Pina shall be default option and the application forms shall be processed accordingly. KNOW YOUR CUSTOMER (KYC): According to guidelines issued by SEBI under 'The Prevention of Money Laundering Act, 2002, Mutual Funds are required to follow enhanced know your customer (KYC) norms. According to enhanced KYC
- 2002, Mutual Funds are required to follow enhanced know your customer (KYC) horms. According to enhanced KYC norms, it is made compulsory for all investors to be KYC compliant while making an application for subscription of units, amounting to Rs. 50,000 and above, w.e.f. February 1, 2008. Birla Sun Life Asset Management Company has made arrangements with CDSL Ventures Limited ("CVL"), to process KYC compliance. Investors can visit branches of BSLAMC or may visit www.birlasunlife.com, www.amfiindia.com and www.cdslindia.com to know detailed procedure for KYC compliance. In submission of KYC application alongwith the prescribed documents "KYC Acknowledgement letter" will be issued by CVL to the applicant. Applications for subscriptions of value of Rs. 50,000 and above without a valid KYC compliance may be rejected. Provided further, where it is not possible to verify the KYC compliance stubus of the investorat the image of lativated further the DSL MMC compliance stubus of the investorat the image of lativated further. compliance may be rejected. Provided further, where it is not possible to verify the KYC compliance status of the investor at the time of allotment of units, the BSLAMC shall verify the KYC compliance status of the investor with an erasonable time after the allotment of units. In the event of non compliance of KYC requirements, the BSLAMC Reserves the right to freeze the folio of the investor(s) for any kind of transactions or affect mandatory redemption of unit holdings of the investors at the applicable NAV, subject to payment of exit load, if any and recovery of unamortized NFO expenses. Investors who have obtained MIN allotment letter by submitting the PAN copy are deemed to be KYC compliant. Investors should note that on completion of KYC Compliance all details of the investor in the Mutual Fund records will be replaced by the details as given in KYC Application Form by the investor to the CVL. Any change in this details like change of Name / Address / Status / Signature, etc. should be given by Investor Store to the CVL in the prescribed manner. MONTHLY DIVIDEND SWEEP FOR BIRA SUN LIFE DVNAM/C BOND FUND: Under this option the Unitholders can opt for switching the dividend earmed under the Scheme into any other Open-ended Equity Scheme or Balanced Scheme of Bila Sun Life Mutual Fund as opted by the Unitholder. The dividend (net of applicable TS), fany) shall be switched subject to minimum investment eligibility criteria of the scheme into which
- minimum investment/sweep amount of Rs. 1000 or the minimum investment eligibility criteria of the scheme into which
- minimum investment/sweep amount of Rs. 1000 or the minimum investment eligibility criteria or the science into winch the dividend is sweeped in; whichever is higher, at applicable NAV based prices plus applicable load, (ex-dividend NAV, if the opted Scheme has a record date on the date of exercise of sweep option). List of Mandatory fields needs to be included :- ECS Debit Bank Account Details / Authorization bank details should be same, MICR CODE other than core banking and auto debit banks. Each sign arount, Scheme name with option. Start date, Signature on ECS Mandate and Bank Authorisation, Register FOR to be selected. If this field is left blank. The SIP Application form is liable to be rejected.
- 27 MICRO SIP
  - Micro SIP: In accordance with AMFI notification and Guidelines issued on July 14, 2009, Systematic Investment Plans (SIPs) by investor where aggregate of installments in a rolling 12-month period or in a financial year i.e. April to March does not exceed Rs 50,000 (known as 'Micro SIP') shall be exempted from the requirement of PAN. This exemption of PAN requirement is only available to individuals (including NRIs but not PIOs), Minors and
  - (c)
  - This exemption of the revealed of the second and th Legislative Assembly/Parliament, ID card issued to employees of Scheduled Commercial/State/District Co-operative Banks, Senior Citizen/Freedom Fighter ID card issued by Government, Cards issued by Universities/deemed Universities or institutes under statutes like ICAI, ICWA, ICSI etc., Permanent Retirement Account No (PRAN) card Since of instances and statutes inter ICAL, ICAA, ICAE (ICA, ICAE), Perindrahl Retinent Recommented (IPARI) cau issued to New Pension System (NPS) subscribers by CRA (NSDL), Any other photo ID card issued by Central Government/State Governments/Municipal authorities/Government organizations like ESIC / EPF0. The document submitted shall be self attested and attested by the ARN holder, if any, mentioning the ARN number. Additional Micro SIP in same folio: For subsequent Micro SIP applications, investor can quote the existing folio number under a Micro SIP hope preliced and and ord card concerving the applications.
  - number where a Micro SIP has been registered and need not resubmit the supporting document.
  - (f)
  - the investors may redeem their investments

Plan

Plan

**Request for** 

- Registration of SIP
- **Renewal of SIP**
- **Change in Bank Details**

Additional Micro SIP in same folio

Amount (R	s)		

Sweep To:- Scheme Name

Scheme Name

Option Option

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) SIP THROUGH ECS FACILITY APPLICATION FORM

- - In case of my deficiencies in the supporting documents or in case of the aggregate of SIP Investments exceeding Micro SIP threshold, the Mutual Fund reserves the right to reject the applications. In case the first Micro SIP installment is processed, and the application is found to be defective, the Micro SIP registration will be ceased for future installments. No refund shall be made for the units already allotted and