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Birla Sun Life  
Mutual Fund

# Key Information Memorandum & Common Application Form

Continuous Offer of Open Ended Scheme(s) at NAV Based Prices

Solutions for your varied financial needs



Savings Solutions



Tax Savings Solutions

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Regular Income Solutions



Wealth Creation Solutions

The Financial Solution(s) stated above is ONLY for highlighting the many advantages perceived from investments in Mutual Funds but does not in any manner, indicate or imply, either the quality of any particular Scheme or guarantee any specific performance/returns. Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

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Product Labeling 

**SPONSORS:** Aditya Birla Financial Services Private Limited, Indian Rayon Compound, Veraval, Gujarat - 362 266. Sun Life (India) AMC Investments Inc., 150 King Street West, Toronto, ON Canada M5H 1J9. **INVESTMENT MANAGER:** Birla Sun Life Asset Management Company Limited, One India Bulls Centre, Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013. CIN: U65991MH1994PLC080811. **REGISTRAR & TRANSFER AGENTS:** Computer Age Management Services Pvt. Ltd. (CAMS), Unit: Birla Sun Life Mutual Fund, New No. 10, Old No. 178, M.G.R. Salai, Nungambakkam, Chennai - 600 034. This Common Key Information Memorandum (KIM) sets forth the information, which a prospective investor ought to know before investing. **For further details of the scheme/Mutual Fund, due diligence certificate by the AMC, Key Personnel, Investor's rights & services, risk factors, penalties & pending litigations etc. investors should, before investment, refer to the Scheme Information Document and Statement of Additional Information available free of cost at any of the Investor Service Centres or distributors or from the website [www.birlasunlife.com](http://www.birlasunlife.com). The Scheme particulars have been prepared in accordance with Securities and Exchange Board of India (Mutual Funds) Regulations 1996, as amended till date, and filed with Securities and Exchange Board of India (SEBI). The units being offered for public subscription have not been approved or disapproved by SEBI, nor has SEBI certified the accuracy or adequacy of this Common KIM. This Common KIM is dated October 09, 2015.**

# COMMON APPLICATION FORM

For Resident Indians and NRIs/FIIs/FPIs



**(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. All sections to be completed in ENGLISH in BLACK / BLUE COLOURED INK and in BLOCK LETTERS.)**

Distributor Name / ARN No.	Sub Broker Name / ARN No.	Sub Broker Code	Employee Unique ID. No. (EJIN)	Application No.
ARN-74461			E063566	

EJIN is mandatory for "Execution Only" transactions. Ref. Instruction No. 9  
I/we hereby confirm that the EJIN 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.

First Applicant / Authorised Signatory	Second Applicant	Third Applicant

### TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTORS/AGENTS ONLY (Refer Instruction 1 (viii))

In case the subscription (lumpsum) amount is ₹ 10,000/- or more and your Distributor has opted to receive Transaction Charges, ₹ 150/- (for first time mutual fund investor) or ₹ 100/- (for investor other than first time mutual fund investor) will be deducted from the subscription amount and paid to the distributor. Units will be issued against the balance amount invested.

### EXISTING UNITHOLDER please fill in your Folio No., Name & Email ID and then proceed to Section 5 (Applicable details and Mode of holding will be as per the existing Folio No.)

Existing Folio No.

### 1. FIRST / SOLE APPLICANT INFORMATION (MANDATORY) (Refer Instruction No. 2,3,4) Fresh / New Investors fill in all the blocks. (1 to 10) In case of investment "On behalf of Minor", Please Refer Instruction no. 2(ii)

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

PAN / PEKRN (Mandatory)  Date of Birth\*\*          KYC

AADHAR Card Number

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

PAN / PEKRN (Mandatory)  Date of Birth\*\*          KYC

AADHAR Card Number

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

PAN / PEKRN (Mandatory)  Date of Birth\*\*          KYC

AADHAR Card Number

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

Mr. Ms. M/s.

PAN / PEKRN (Mandatory)  Date of Birth\*\*          KYC

AADHAR Card Number

### RELATIONSHIP OF GUARDIAN (Refer Instruction No. 2(ii))

ISD CODE  TEL: OFF.  S  T  D

TEL: RESI  S  T  D

Proof of the Relationship with Minor\*\*  \*\* Mandatory in case the First / Sole Applicant is Minor

### TAX STATUS (Please tick (✓)) (Applicable for First / Sole Applicant)

- Resident Individual  FII  NRI - NRO  HUF  Club / Society  PIO  Body Corporate  Minor  Government Body  
 Trust  NRI - NRE  Bank & FI  Sole Proprietor  Partnership Firm  QFI  Others \_\_\_\_\_ (Please Specify)

MODE OF HOLDING (Please tick (✓)) (Please Refer Instruction No. 2(v))  Joint  Single  Anyone or Survivor (Default option is Anyone or survivor)

### MAILING ADDRESS OF FIRST / SOLE APPLICANT (P.O.Box Address is not sufficient. Please provide full address.) (Indian Address in case of NRIs/FIIs)

CITY	<input type="text"/>
STATE	<input type="text"/>
PIN CODE	<input type="text"/>

### ACKNOWLEDGEMENT SLIP (To be filled in by the Investor)

### COMMON APPLICATION FORM



## Birla Sun Life Asset Management Company Limited

One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013

Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 567679 | Email: connect@birlasunlife.com

Application No.

Collection Centre /  
BSLAMC Stamp & Signature

Received from Mr. / Ms.  Date :  /  /

(Please tick (✓)) ENCLOSED  PAN/PEKRN Proof  KYC Complied  NECS Form  Yes  No

**2. GO GREEN** (Please tick (✓)) (Refer Instruction No. 10)

SMS Transact  Online Access **Mobile No.** +91 \_\_\_\_\_ / We would like to register for my/our SMS Transact and/ or Online Access

**Email Id** \_\_\_\_\_

Default Communication mode is E-mail only, if you wish to receive following document(s) via physical mode:  Account Statement  Annual Report  Other Statutory Information

**Facebook Id** \_\_\_\_\_

**Twitter Id** \_\_\_\_\_

**3. 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(A)

Name of the Bank \_\_\_\_\_

Branch Address \_\_\_\_\_

Pin Code \_\_\_\_\_

City \_\_\_\_\_

Account No. \_\_\_\_\_

Account Type (Please tick (✓))  SAVINGS  CURRENT  NRE  NRO  FCNR  OTHERS (please specify) \_\_\_\_\_

11 Digit IFSC Code \_\_\_\_\_

9 Digit MICR Code \_\_\_\_\_

**4. INVESTMENT DETAILS** (Please tick (✓)) (Refer Instruction No. 5, 9 & 14) (If this section is left blank, only folio will be created)

Separate cheque/ demand draft must be issued for each investment drawn in favour of respective scheme name and the instrument should be crossed "A/c Payee Only". Please write appropriate scheme name as well as the Plan/Option/Sub Option

S. No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (applicable only for Dividend option)	Amount Invested (₹)	^DD Charges	Net Amount Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch and Account Number
1.	BSL Tax Relief 96	Growth/ Growth	Scheme Name					
			Plan / Option					

# (Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR) \*All purchases are subject to realization of funds ^Refer to Instruction No. 5 (vi)

**KYC DETAILS (Mandatory)**

**OCCUPATION** (Please tick (✓))

**FIRST APPLICANT**  Private Sector Service  Public Sector Service  Government Service  Business  Professional  Agriculturist  Retired  Housewife  Student  Forex Dealer  Others ..... (please specify)

**SECOND APPLICANT**  Private Sector Service  Public Sector Service  Government Service  Business  Professional  Agriculturist  Retired  Housewife  Student  Forex Dealer  Others ..... (please specify)

**THIRD APPLICANT**  Private Sector Service  Public Sector Service  Government Service  Business  Professional  Agriculturist  Retired  Housewife  Student  Forex Dealer  Others ..... (please specify)

**GROSS ANNUAL INCOME** (Please tick (✓))

**FIRST APPLICANT**  Below 1 Lac  1-5 Lacs  5-10 Lacs  10-25 Lacs  > 25 Lacs - 1 Crore  > 1 Crore

Net worth (Mandatory for Non - Individuals Rs. \_\_\_\_\_ as on DD MM YYYY [Not older than 1 year])

**SECOND APPLICANT**  Below 1 Lac  1-5 Lacs  5-10 Lacs  10-25 Lacs  > 25 Lacs - 1 Crore  > 1 Crore OR Net Worth \_\_\_\_\_

**THIRD APPLICANT**  Below 1 Lac  1-5 Lacs  5-10 Lacs  10-25 Lacs  > 25 Lacs - 1 Crore  > 1 Crore OR Net Worth \_\_\_\_\_

**For Individuals**

I am Politically Exposed Person  
 I am Related to Politically Exposed Person  
 Not Applicable

**For Non-Individual Investors (Companies, Trust, Partnership etc.)**

Is the company a Listed Company or Subsidiary of Listed Company or Controlled by a Listed Company:  Yes  No (If No, please attach mandatory UBO Declaration)  
 Foreign Exchange / Money Charger Services  Yes  No  
 Gaming / Gambling / Lottery / Casino Services  Yes  No  
 Money Lending / Pawning  Yes  No



S. No.	Scheme Name	Plan / Option	Net Amount Paid (₹)	Payment Details	
				Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch
1.	BSL				

**5. DEMAT ACCOUNT DETAILS (OPTIONAL)** (Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c. held with the depository participant.) Refer Instruction No. 3(B)

NSDL: Depository Participant Name: \_\_\_\_\_ DPID No.: I N \_\_\_\_\_ Beneficiary A/c No. \_\_\_\_\_  
 CDSL: Depository Participant Name: \_\_\_\_\_ Beneficiary A/c No. \_\_\_\_\_

Enclosed:  Client Master  Transaction/ Statement Copy/ DIS Copy

**6. NOMINATION DETAILS (Mandatory)** (Refer Instruction No. 7)

I/We wish to nominate  I/We DO NOT wish to nominate and sign here ..... 1st Applicant Signature (Mandatory)

	Nominee Name and Address	Guardian Name (in case of Minor)	Allocation %	Nominee/ Guardian Signature
Nominee 1			100%	

To register multiple nominee please fill separate Multiple nomination Form.

**7. FATCA & CRS INFORMATION (Please tick (✓)) For Individuals & HUF (Mandatory) Non Individual investors should mandatorily fill separate FATCA detail form**

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
Name of Applicant			
Place/ City of Birth			
Country of Birth			
Country of Tax Residency#			
Tax Payer Ref. ID No^			
Identification Type [TIN or other, please specify]			
Country of Tax Residency 2			
Tax Payer Ref. ID No. 2			
Identification Type [TIN or other, please specify]			
Country of Tax Residency 3			
Tax Payer Ref. ID No. 3			
Identification Type [TIN or other, please specify]			

#To also include USA, where the individual is a citizen/ green card holder of USA. ^In case Tax Identification Number is not available, kindly provide its functional equivalent.

**8. DECLARATION(S) & SIGNATURE(S)** (Refer Instruction No. 1)

To, Date DD MM YY YY  
**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 & I/we have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment.

**For Non-Individual Investors:** I/We hereby confirm that the object clause of the constitution document of the entity (viz. MOA / AOA / Trust Deed, etc.), allows us to apply for investment in this scheme of Birla Sun Life Mutual fund and the application is being made within the limits for the same. I/We are complying with all requirements / conditions of the entity while applying for the investments and I/We, including the entity, if the case may arise so, hereby agree to indemnify BSLAMC / BSLMF in case of any dispute regarding the eligibility, validity and authorization of the entity and/or the applicants who have applied on behalf of the entity.

**For NRIs only:** I/We confirm that I am/we are Non Residents of Indian Nationality/Origin 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 /FCNR account. (Refer Inst. No. 6)

I/We confirm that details provided by me/us are true and correct.

\*\*I have voluntarily subscribed to the on-line access for transacting through the internet facility provided by Birla Sun Life Asset Management Company Ltd. (Investment Manager of Birla Sun Life Mutual Fund) and confirm of having read, understood and agree to abide the terms and conditions for availing of the internet facility more particularly mentioned on the website www.birlasunlife.com and hereby undertake to be bound by the same. I further undertake to discharge the obligations 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 ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

**FATCA & CRS Declaration:** I/ We have understood the information requirements of this Form (read along with FATCA & CRS Instructions) and hereby confirm that the information provided by me/ us on this Form is true, correct, and complete. I/ We also confirm that I/ We have read and understood the FATCA & CRS Terms and Conditions and hereby accept the same. (Refer Inst. No. 14)

Signature of First Applicant / Authorised Signatory	Signature of Second Applicant	Signature of Third Applicant
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# SYSTEMATIC INVESTMENT APPLICATION FORM

SIP (WITH MICRO SIP) / CENTURY SIP



## INVESTMENT THROUGH NACH/ECS/NECS/RECS/AUTO DEBIT/PDC.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. PLEASE ENSURE COMPLETION OF SECTION 4 IN CASE OF CENTURY SIP)

Investment Advisor's Name & ARN ARN-74461	Sub-Broker's Name & ARN No.	Official Acceptance Point Stamp & Sign	Employee Unique ID. No. (EUN) E063566
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EUN is mandatory for "Execution Only" transactions. Ref. Instruction No. G-3  
I/we hereby confirm that the EUN box has been intentionally left blank my 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.

First Applicant / Authorised Signatory	Second Applicant	Third Applicant
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Request for  Registration of SIP  Registration of CSIP  Renewal of SIP  Change in Bank Details  Additional Micro SIP in same folio Date

**TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTORS/AGENTS ONLY (Refer Instruction G (9))**  
In case of subscriptions through SIPs, transaction charge of ₹ 150/- (for first time mutual fund investor) or ₹ 100/- (for investor other than first time mutual fund investor) will be deducted and paid to your distributor if opted to receive the transaction charges. In such cases the transaction charge shall be recovered in 3-4 installments but only where total commitment (i.e. amount per SIP installment x No. of installments) amounts to ₹ 10,000/- or more. Units will be issued against the balance of the installment amounts invested.

Existing Investor Folio No.  Application No.  (New Folio will be Generated for CSIP)

### 1. FIRST / SOLE APPLICANT INFORMATION (MANDATORY)

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* (Mandatory)	KYC Mandatory	Date of birth**	Document Type* (Photo Id/ Address Proof)	Document No.* (Mandatory for Micro SIP, not for additional Micro SIP in same folio)
Sole / First Applicant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
Second Applicant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
Third Applicant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
Guardian/POA Holder	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>

Ref. Instruction No. G-2 \*For Micro SIP Only \*\* Mandatory in case the First/Sole Applicant is Minor  
**NAME OF THE GUARDIAN (In case of minor) / CONTACT PERSON - DESIGNATION / PoA HOLDER (In case of Non-individual Investors)**  
Mr. Ms. M/s.

**RELATIONSHIP OF GUARDIAN** (Refer to Instruction No. E.24)

### 2. INVESTMENT DETAILS (PLEASE REFER INSTRUCTIONS D & F-1 FOR INFORMATION ON ELIGIBLE SCHEMES. ONLY ONE SCHEME PER APPLICATION FORM)

Separate cheque/ demand draft must be issued for each investment drawn in favour of respective scheme name and the instrument should be crossed "A/c Payee Only". Please write appropriate scheme name as well as the Plan/Option/Sub Option

S. No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (Refer G-4) (applicable only for Dividend option)	Amount Invested (₹)	DD Charges	Net Amount Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch and Account Number
1.	BSL Tax Relief 96	Growth/ Growth	Scheme Name Plan / Option	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# (Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR) \*All purchases are subject to realization of funds ^Refer to Instruction No. 5 (vi)

(Please tick (✓) any ONE of the below as your Installment amount OR enter the amount of your choice. In case of multiple entries, the highest amount will be chosen.  
Each Installment Amount (₹) ₹ 20,000/-  ₹ 10,000/-  ₹ 6,000/-  ₹ 3,000/-  Amount

### 3. DEBIT MANDATE - NACH/ECS/DIRECT DEBIT/ONE TIME MANDATE [Applicable for Lumpsum Additional Purchases as well as SIP Registrations] Please attach a cancelled cheque/cheque copy.

UMRN  Date

(tick ✓)  
 CREATE  MODIFY  CANCEL  
Sponsor Bank Code  Office use only Utility Code  Office use only  
I/We hereby authorize: **BIRLA SUN LIFE MUTUAL FUND** to debit (tick ✓)  SB / CA / CC / SB-NRE / SB-NRO / Other

Bank A/c No.:

With Bank:  Bank Name & Branch IFSC  OR MICR

an amount of Rupees  ₹

FREQUENCY  Yearly  As & when presented DEBIT TYPE  Fixed Amount  Maximum Amount

Reference 1 Folio No:  Mobile

Reference 2 Appln No:  Email:

I agree to the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of bank.  
PERIOD  
From

to

or  Until Cancelled

1. Sign ..... 2. Sign ..... Sign .....

Name as in bank records (mandatory) Name as in bank records (mandatory) Name as in bank records (mandatory)

\*This is to confirm that the declaration has been carefully read, understood & made by me/us, I am authorizing Birla Sun Life Mutual Fund to debit my account. I have understood that I am authorized to cancel/ amend this mandate by appropriately communicating the cancellation/ amendment request to Birla Sun Life Mutual Fund or the bank where I have authorised the debit. For Debit Mandate: I/We hereby declare that the particulars given on this mandate are correct and complete and express my willingness and authorize to make payments referred above through participation in NACH/ECS/Direct Debit/Standing Instructions. I/We hereby confirm adherence to the terms of NACH/ECS/NECS/RECS/AUTO DEBIT facility offered by Birla Sun Life Mutual Fund and as amended from time to time and of NACH/ECS (Debits)/Direct Debits/Standing Instructions. The AMC would not be liable for any delay in crediting the scheme collection accounts by the Service Providers which may result in a delay in application of NAV. This is to confirm that the declaration has been carefully read, understood and made by me/us. **Authorisation to Bank:** This is to inform that I/We have registered for ECS / NACH (Debit Clearing) / Direct Debit / Standing instructions facility and that my/our payment towards my/our investment in Birla Sun Life Mutual Fund shall be made from my/our above mentioned bank account with your Bank. I/We authorize the representatives of Birla Sun Life Mutual Fund carrying this mandate form to get it verified and executed. I/We authorize the bank to debit my account for any charges towards mandate verification, registration, transactions, returns, etc, as applicable.

### ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) SYSTEMATIC INVESTMENT THROUGH NACH/ NECS / DIRECT DEBIT / PDC FACILITY APPLICATION FORM Application No.

Birla Sun Life Asset Management Company Limited  
One India Bulls Centre, Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013  
Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 567679 | Email: connect@birlasunlife.com

Collection Centre / BSLAMC Stamp & Signature

Received from Mr. / Ms.  Date :

**2. INVESTMENT DETAILS** (PLEASE REFER INSTRUCTIONS D & F-1 FOR INFORMATION ON ELIGIBLE SCHEMES. ONLY ONE SCHEME PER APPLICATION FORM)

Contd...

<b>First Installment through Cheque / DD.</b> (MANDATORY FOR CSIP)		1st Cheque / DD No.	1st Cheque Dated	DD / MM / YYYY
Drawn on Bank			Amount (₹) (in figures)	
Branch	City			
<b>For PDC</b>	Cheques dates From:	DD / MM / YYYY	To	DD / MM / YYYY
	Cheque No. From:		To	
Investment Start Date	DD / MM / YYYY	Frequency	MONTHLY (max 4 debit dates) (Only one date for CSIP and Step Up SIP)	
Investment Dates	1st <input type="checkbox"/> 7th <input type="checkbox"/> 10th <input type="checkbox"/> 15th <input type="checkbox"/> 20th <input type="checkbox"/> 28th <input type="checkbox"/>			
At Birla Sun Life Mutual Fund, we provide YOU the flexibility to discontinue your SIP at ANYTIME. Call us at 1800-270-7000/1800-22-7000 or email us at connect@birlasunlife.com to know how.		<input type="checkbox"/> <b>Default End Date (31st December 2099)</b> ^ <b>SELECT YOUR SIP PERIOD</b> Refer Instruction E-11 & F-5 Till you instruct Birla Sun Life Mutual Fund to discontinue your SIP <input type="checkbox"/> OR Enter SIP End Date DD / MM / YYYY CSIP Tenure (Insurance cover would be as per 1st installment): 55 years - Your Current Age _____ years = _____ years Frequency: Monthly Only.		

^ For Regular SIP - "Default end date is December 31, 2099. In case the 'End Date' is not mentioned by the investor in the Form, the same would be considered as 31st December, 2099 by default". For CSIP - refer instruction F5

**STEP-UP SIP (OPTIONAL - and available only for SIP/CSIP Investments through NECS)** (Refer Instruction E-25)

Amount (Default of ₹ 500/-) ₹ 500/-  ₹ 1,000/-  Amount (In multiples of ₹ 500/-) \_\_\_\_\_ **STEP-UP SIP Frequency** (Default Yearly) Half Yearly  Yearly

**4. FOR CENTURY SIP** (Please read detailed Terms & Conditions for availing CSIP) Mandatory

Date of Birth	DD / MM / YYYY	GENDER	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
<b>NOMINATION DETAILS</b> (Refer Instruction No. F-14) <b>Nomination as stated below, shall be considered and prevail over nomination details provided in Common Application Form.</b>			
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 case of minor):		____ / ____ / ____
Relationship :	Guardian / Parent Name (in case of minor):		_____
Address :	Signature of Nominee or Parent / Guardian		

**5. DEMAT ACCOUNT DETAILS (OPTIONAL)** (Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c. held with the depository participant.) Refer Instruction No. E (27)

<b>NDSL:</b> Depository Participant Name: _____	DPID No.:	I N _____	Beneficiary A/c No.	_____
<b>CDSL:</b> Depository Participant Name: _____	Beneficiary A/c No. _____			

**6. DECLARATION(S) & SIGNATURE(S)**

I/We hereby authorise Birla Sun Life Mutual Fund and their authorised service provider to debit the above bank account by NACH/ ECS/ NECS/ RECS/ Auto Debit /PDC Clearing for collection of SIP payments. I/We understand that the information provided by me/us may be shared with third parties for facilitating transaction processing through NACH/ ECS/ NECS/ RECS/ Auto Debit /PDC Clearing or for compliance with any legal or regulatory requirements. I/We hereby declare that the particulars given above are correct and complete and express my/our willingness to make payments referred above through participation in NACH/ ECS/ NECS/ RECS/ Auto Debit/ PDC Clearing. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We will not hold BSLAMC/MF or their appointed service providers or representatives responsible. I/We will also inform, about any changes in my bank account immediately. I/We undertake to keep sufficient funds in the funding account on the date of execution of standing instruction. I/We have read and agreed to the terms and conditions mentioned overleaf. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

**For Century SIP:** I/We hereby opt for Birla Sun Life Century SIP and agree and confirm to have read, understood and accepted the Terms and Conditions of Century SIP and Insurance Cover. **For Micro SIP only:** I hereby 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 i.e. April to March will result in aggregate investments exceeding ₹ 50,000 in a year. I / we am / are aware and understand that if, at the time of availing the Micro SIP I / we hold a valid Permanent Account Number (PAN) issued by the Income Tax Department of India, a KYC acknowledgment letter issued by CDSL Ventures Limited would have to be submitted by me / us to MF/AMC. Accordingly I / we understand and agree that I / we shall be responsible for the consequences of non-submission of the same, if any. (refer Instruction no: E-23)

Signature(s)	Name of First Unit Holder (As in Bank Records)	Name of Second Unit Holder (As in Bank Records)	Name of Third Unit Holder (As in Bank Records)
	First Applicant	Second Applicant	Third Applicant
(To be signed by All Applicants if mode of operation is Joint)			

**H. INSTRUCTIONS FOR DEBIT MANDATE FORM NACH/ECS/DIRECT DEBIT**

- Investors who have already submitted an NACH/ECS/NECS/AUTO DEBIT form or already registered for NACH/ECS/NECS/AUTO DEBIT facility should not submit NACH/ECS/NECS/AUTO DEBIT form again as NACH/ECS/NECS/AUTO DEBIT registration is a one-time process only for each bank account.
- Investors, who have not registered for NACH/ECS/NECS/AUTO DEBIT facility, may fill the NACH/ECS/NECS/AUTO DEBIT form and submit duly signed with their name mentioned.
- Mobile Number and Email Id: Unit holder(s) should mandatorily provide their mobile number and email id on the mandate form. Where the mobile number and email id mentioned on the mandate form differs from the ones as already existing in the folio, the details provided on the mandate will be updated in the folio. All future communication whatsoever would be, thereafter, sent to the updated mobile number and email id.
- Unit holder(s) need to provide along with the mandate form an original cancelled cheque (or a copy) with name and account number pre-printed of the bank account to be registered or bank account verification letter for registration of the mandate failing which registration may not be accepted. The Unit holder(s) cheque/ bank account details are subject to third party verification.
- Investors are deemed to have read and understood the terms and conditions of NACH/ECS/NECS/AUTO DEBIT Facility, SIP registration through NACH/ ECS/ NECS/ RECS/AUTO DEBIT facility, the Scheme Information Document, Statement of Additional Information, Key Information Memorandum, Instructions and Addenda issued from time to time of the respective Scheme(s) of Birla Sun Life Mutual Fund.

<b>Acknowledgement</b>	ISC Stamp
Investor Name: _____	Folio No/Application No. _____
<input type="checkbox"/> DEBIT MANDATE FORM <input type="checkbox"/> SIP FORM	

Website : www.birlasunlife.com | E-mail : connect@birlasunlife.com | Contact Centre : 1-800-270-7000/ 1-800-22-7000

**ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) SYSTEMATIC INVESTMENT THROUGH NACH/ NECS / DIRECT DEBIT / PDC FACILITY APPLICATION FORM**

Scheme Name _____	Plan _____	Option _____
Sweep To:- Scheme Name _____	Plan _____	Option _____
Amount (₹) _____		

- Request for**
- Renewal of SIP
  - Registration of SIP
  - Registration of CSIP
  - Change in Bank Details
  - Additional Micro SIP in same folio