## **MUTUAL FUNDS** Aditya Birla Sun Life Mutual Fund



# 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	/ RIA N	o. S	Sub E	3rok	er Na	ame	& Al	RN/	RIA	No.		S	ub E	Broke	er Co	de	E	mplo	yee	Un	iqu	e ID	. No	. (E	UIN	)	Ap	plica	tion	No.	
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Aditya Birla Sun Life AMC Limited

(Formerly known as Birla Sun Life Asset Management Company Limited)

Rogen. No.: 109. Rogd Office: One Indiabulls Comtre, Tower 1, 17th Floor, Jupiter Mill Compound,

841, Somapati Bapat Marg, Elphinstoner Road, Mumbai - 400013

+91 22 4356 7000 | card.mutualfunds@adityabirlacapital.com | www.adityabirlasunlifomf.com | CIN: U65991MH1994PLC080811

adityabirlacapital.com

Contact Us:



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Sole/First Applicant				Foreign Exch	ange / Mone	y Charger Services			Yes	
Second Applicant				Gaming / Gar	mbling / Lot	tery / Casino Services			Yes	
Third Applicant				Money Lendir	ng / Pawning				Yes	
DEMAT ACCOUNT DETAIL	LS (OPTIONAL)	(Please ensure th	nat the sequence	of names as mentione	ed in the applicat	ion form matches with that o	f the A/c. held with the d	epository participant.)	) Refer Instruction No. 3(B)	
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Enclosed: Client M	aster T	ransaction/ S	tatement Co	py/ DIS Copy						
NOMINATION DETAILS (	Mandatory) (Re	efer Instruction No	o. 7)							
I/We wish to nomi	nate 🗌 I/We	DO NOT wish	n to nominate	and sign here				1st Applicant	t Signature (Mandatory)	
		Name and Ad		Applicant's	Relationship		in case of Minor)	Allocation %	Nominee/ Guardian S	
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DECLARATION(S)	& SIGNATURE(S)	(Refer Instruction No	1)

To,

8.

The Trustee,

#### Aditva Birla Sun Life AMC Ltd.



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 Aditya Birla Sun Life AMC Ltd. 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 ABSLAMC / ABSLMF 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 Aditya Birla Sun Life AMC Ltd. (Investment Manager of Aditya 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.adityabir-lacapital.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.

"I / We acknowledge that the RIA has entered into an agreement with the AMC / MF for accepting transaction feeds under the code. I / We hereby indemnify, defend and hold harmless the AMC / MF against any regulatory action, damage or liability that they may suffer, incur or become subject to in connection therewith or arising from sharing, disclosing and transferring of the aforesaid information."

I/We hereby provide my /our consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (ii) updating my/our Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA.

I/We hereby provide my/our consent for sharing/disclosing of my Aadhaar number(s) including demographic information with the asset management companies of SEBI registered mutual fund and their Registrar and Transfer Agent (RTA) for the purpose of updating the same in my/our folios.

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)

Inst. No. 14)		
Signature of First Applicant / Authorised Signatory	Signature of Second Applicant	Signature of Third Applicant

#### CONFIRMATION CLAUSE

I/We hereby give consent to the Company or its Authorized Agents and third party service providers to use information/data provided by me to contact me t	hrough any channel of
communication including but not limited to email, telephone, sms, etc. and further authorise the disclosure of the information contained herein to its affiliates/gr	oup companies or their
Authorized Agents or Third Party Service Providers in order to provide information and updates to me on various financial and investment products and offering	of other services. I/We
agree that all personal or transactional related information collected/provided by me can be shared/transferred and disclosed with the above mentioned par	ties including with any
regulatory, statutory or judicial authorities for compliance with any law or regulation in accordance with privacy policy as available at the website of the Company.	Yes 🔲 No 🔲

### VALUE ADD

I/We am/are interested in knowing my/our credit score and am/are happy to receive help in this regard.

I / We hereby provide my consent to :-

- 1. Aditya Birla Sun Life AMC Limited and its group companies & associates to conduct check on my/our credit information with any of the credit bureau.
- 2. Aditya Birla Sun Life AMC Limited and its group companies & associates to conduct a background check either by their employees or through any third party vendor. Yes No

## **MUTUAL FUNDS** Aditya Birla Sun Life Mutual Fund



# Common Application Form For Resident Indians and NRIs/FIIs/FPIs

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Aditya Birla Sun Life AMC Limited

(Formerly known as Birla Sun Life Asset Management Company Limited)

Rogn. No.: 109. Rogd Office: Ond Indiabulls Contror, Towor 1, 17th Floor, Jupitor Mill Compound,
841, Sonapati Bapat Marg, Elphinstona Road, Mumbai - 400013

+91 22 4356 7000 | card.mutualfunds@adityabirlacapital.com | www.adityabirlasunlifomf.com | CIN: U65991MH1994PLC080811

adityabirlacapital.com



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perate chaque/ 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". Ineases write appropriate scheme name as well as the Plan/Option/Sub Option    Cheque / DD Revouring   Scheme Name* (refer instruction 8)   Plan/Option   Cheque   Amount   Date   Invested (1)   DD   Net Amount   Cheque/DD No./UTR No. (in case of NEFT/RTGS)	11 [	Digit IFS	SC Cod	е		T									9 D	igit MI	ICR Co	de				T									
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THIRD APPLICANT Student Forex Dealer Others (please specify)  GROSS ANNUAL INCOME [Please tick ( / )]  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 D M M Y Y Y Y INot older than 1  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  S. Scheme Name Plan / Option Net Amount Paid (*)  Cheque/DD No./UTR No. (in case of NEFT/RTGS)  Bank and Branch	SE	COND A	APPLIC	ANT	s	tudent				Forex	Deale	r	[	Oth	ers									(pl	ease s	pecify	/)	_			
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				For Non-Indiv	idual investo	rs (Companies, Trust, P	arthership etc.)			
	I am Politically Exposed Person	I am Related to Politically Exposed Person	Not Applicable	(If No, please	attach man	datory UBO Declaratio		y or Controlled b	y a Listed Companyes	
Sole/First Applicant				Foreign Exch	ange / Mone	y Charger Services			Yes	
Second Applicant				Gaming / Gar	mbling / Lot	tery / Casino Services			Yes	
Third Applicant				Money Lendir	ng / Pawning				Yes	
DEMAT ACCOUNT DETAIL	LS (OPTIONAL)	(Please ensure th	nat the sequence	of names as mentione	ed in the applicat	ion form matches with that o	f the A/c. held with the d	epository participant.)	) Refer Instruction No. 3(B)	
NSDL: Depository P	articipant Na	me:			DPID No.:	IN	Bene	ficiary A/c No.		
CDSL: Depository P	articipant Na	me:				Beneficiary A/c No				
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NOMINATION DETAILS (	Mandatory) (Re	efer Instruction No	o. 7)							
I/We wish to nomi	nate 🗌 I/We	DO NOT wish	n to nominate	and sign here				1st Applicant	t Signature (Mandatory)	
		Name and Ad		Applicant's	Relationship		in case of Minor)	Allocation %	Nominee/ Guardian S	
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DECLARATION(S) & SIGNATURE(S)	(Refer Instruction No. 1)

To,

8.

The Trustee,

#### Aditva Birla Sun Life AMC Ltd.



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 Aditya Birla Sun Life AMC Ltd. 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 ABSLAMC / ABSLMF 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 Aditya Birla Sun Life AMC Ltd. (Investment Manager of Aditya 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.adityabir-lacapital.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.

"I / We acknowledge that the RIA has entered into an agreement with the AMC / MF for accepting transaction feeds under the code. I / We hereby indemnify, defend and hold harmless the AMC / MF against any regulatory action, damage or liability that they may suffer, incur or become subject to in connection therewith or arising from sharing, disclosing and transferring of the aforesaid information."

I/We hereby provide my /our consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (ii) updating my/our Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA.

I/We hereby provide my/our consent for sharing/disclosing of my Aadhaar number(s) including demographic information with the asset management companies of SEBI registered mutual fund and their Registrar and Transfer Agent (RTA) for the purpose of updating the same in my/our folios.

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 lost No. 14)

	Inst. No. 14)		
L	Signature of First Applicant / Authorised Signatory	Signature of Second Applicant	Signature of Third Applicant

#### CONFIRMATION CLAUSE

I/We hereby give consent to the Company or its Authorized Agents and third party service providers to use information/data provided by me to contact me t	hrough any channel of
communication including but not limited to email, telephone, sms, etc. and further authorise the disclosure of the information contained herein to its affiliates/gr	oup companies or their
Authorized Agents or Third Party Service Providers in order to provide information and updates to me on various financial and investment products and offering	of other services. I/We
agree that all personal or transactional related information collected/provided by me can be shared/transferred and disclosed with the above mentioned per	ties including with any
$regulatory, statutory \ or \ judicial \ authorities for \ compliance \ with \ any \ law \ or \ regulation \ in \ accordance \ with \ privacy \ policy \ as \ available \ at \ the \ website \ of \ the \ Company.$	Yes No

### VALUE ADD

I/We am/are interested in knowing my/our credit score and am/are happy to receive help in this regard.

I / We hereby provide my consent to :-

- 1. Aditya Birla Sun Life AMC Limited and its group companies & associates to conduct check on my/our credit information with any of the credit bureau.
- 2. Aditya Birla Sun Life AMC Limited and its group companies & associates to conduct a background check either by their employees or through any third party vendor. Yes No