

# MULTI SCHEME SIP/CSIP FACILITY APPLICATION FORM

SIP (WITH MICRO SIP)



(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM.)

Employee Unique ID. No. (EUIIN)

## INVESTMENT THROUGH NACH/AUTO DEBIT

Investment Advisor's Name & ARN	Sub-Broker's Name & ARN No.	Official Acceptance Point Stamp & Sign
Direct	Direct	

EUIIN is mandatory for "Execution Only" transactions. Ref. Instruction No. D-3  
I/we hereby confirm that the EUIIN 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 inappropriateness, 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  OTM Registration Date D D M M Y Y Y Y

### TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTORS/AGENTS ONLY (Refer Instruction D (8))

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.

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

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

### 2. INVESTMENT DETAILS (Refer Instruction C5 & C8)

SR. No.	Scheme Name	Plan/ Option	1 <sup>st</sup> Investment Amount	SIP/CSIP Installment Amount	Frequency	SIP Date
1.	BSL				Monthly <input type="checkbox"/> (max 4 debit dates) (Only one date for CSIP/Step UP SIP) (Fast Forward SIP is only available for Monthly Frequency) (CSIP frequency-Monthly only)	1 <input type="checkbox"/> 7* <input type="checkbox"/> 10 <input type="checkbox"/> 15 <input type="checkbox"/> 20 <input type="checkbox"/> 28 <input type="checkbox"/> (*Default Date)
2.	BSL				OR	
3.	BSL				Weekly <input type="checkbox"/> (Please mention any day from Monday to Friday) (Default day is Wednesday)	
Cheque Date: <span style="border: 1px solid black; padding: 2px;">DDMMYYYY</span>		Cheque number:	Cheque Amount:		Drawn on Bank and Branch:	

^ 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".

SIP/SIP Start Date: <span style="border: 1px solid black; padding: 2px;">DDMMYYYY</span>	For CSIP End Date: 60 years - Your Current Age <input type="checkbox"/> years = <input type="checkbox"/> years OR <input type="checkbox"/> Till Further Instruction (Refer Instruction E5)
	For SIP End Date: <input type="checkbox"/> 5 years <input type="checkbox"/> 10 years <input type="checkbox"/> 15 years <input type="checkbox"/> 31/12/99 <input type="checkbox"/> Others <span style="border: 1px solid black; padding: 2px;">DDMMYYYY</span> (Please specify)

STEP-UP SIP (OPTIONAL - and available only for SIP/CSIP Investments through NACH) (Refer Instruction C-21)

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

Use existing One Time Mandate

Bank name                    A/c No.                   

(To be filled in case of more than one OTM registration)

<b>3. DEBIT MANDATE-ONE TIME MANDATE / NACH / AUTO DEBIT</b> [Applicable for Lumpsum Additional Purchases as well as SIP Registrations] Please attach a cancelled cheque/cheque copy.	
Date <span style="border: 1px solid black; padding: 2px;">D D M M Y Y Y Y</span>	
<p>(tick✓)</p> <p><input checked="" type="checkbox"/> CREATE <input type="checkbox"/> MODIFY <input type="checkbox"/> CANCEL</p> <p>Sponsor Bank Code <span style="border: 1px solid black; padding: 2px;">                  </span> Office use only <span style="border: 1px solid black; padding: 2px;">                  </span> Utility Code <span style="border: 1px solid black; padding: 2px;">                  </span> Office use only</p> <p>I/We hereby authorize: <span style="border: 1px solid black; padding: 2px;">BIRLA SUN LIFE MUTUAL FUND</span> to debit (tick✓) <span style="border: 1px solid black; padding: 2px;">SB / CA / CC / SB-NRE / SB-NRO / Other</span></p>	
<p>Bank A/c No.: <span style="border: 1px solid black; padding: 2px;">                  </span></p> <p>With <span style="border: 1px solid black; padding: 2px;">                  </span> Bank Name &amp; Branch <span style="border: 1px solid black; padding: 2px;">                  </span> IFSC <span style="border: 1px solid black; padding: 2px;">                  </span> OR MICR <span style="border: 1px solid black; padding: 2px;">                  </span></p> <p>Bank: <span style="border: 1px solid black; padding: 2px;">                  </span></p> <p>an amount of Rupees <span style="border: 1px solid black; padding: 2px;">                  </span> ₹ <span style="border: 1px solid black; padding: 2px;">                  </span></p>	
<p>FREQUENCY <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/> As &amp; when presented</p> <p>DEBIT TYPE <input type="checkbox"/> Fixed Amount <input type="checkbox"/> Maximum Amount</p>	
<p>Reference 1 Folio No: <span style="border: 1px solid black; padding: 2px;">                  </span> Mobile <span style="border: 1px solid black; padding: 2px;">                  </span></p>	
<p>Reference 2 Appln No: <span style="border: 1px solid black; padding: 2px;">                  </span> Email: <span style="border: 1px solid black; padding: 2px;">                  </span></p>	
<p>I agree for 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.</p>	
<p>PERIOD</p> <p>From <span style="border: 1px solid black; padding: 2px;">DDMMYYYY</span> <span style="border: 1px solid black; padding: 2px;">                  </span> 1. Sign ..... 2. Sign ..... Sign .....</p> <p>to <span style="border: 1px solid black; padding: 2px;">DDMMYYYY</span> <span style="border: 1px solid black; padding: 2px;">                  </span> Name as in bank records (mandatory) <span style="border: 1px solid black; padding: 2px;">                  </span> Name as in bank records (mandatory) <span style="border: 1px solid black; padding: 2px;">                  </span> Name as in bank records (mandatory)</p> <p>or <input type="checkbox"/> Until Cancelled</p>	

**Declaration:** 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 based on the instructions as agreed and signed by me. I have understood that I am authorised 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.

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

**SYSTEMATIC INVESTMENT THROUGH NACH/ AUTO DEBIT 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

**4. FOR CENTURY SIP** (Please read detailed Terms & Conditions for availing CSIP)Date of Birth  DD  MM  YY GENDER  MALE  FEMALE**NOMINATION DETAILS** (Refer Instruction No. E-14)

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): \_\_\_\_\_

Signature of Nominee or Parent / Guardian

Address : \_\_\_\_\_

**Note:** Nomination as stated above, shall be considered and prevail over nomination details provided in Common Application form or registered in the folio. In case Nominee details are not provided the single/sole nominee detail, if available in the Common Application Form (CAF) or in the registered folio would be considered as a nominee for insurance. Multiple nominees if available in CAF or folio would be considered for the purpose of insurance in case nomination details are not provided. (For complete details refer to terms & conditions – Century SIP point 14). Birla Sun Life AMC would intimate the above nomination to Birla Sun Life Insurance for the purpose of insurance cover.

**5. 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/ 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/ 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/ 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. (refer Instruction no: C-19).

Signature(s)	Name of First Unit Holder	Name of Second Unit Holder	Name of Third Unit Holder
	First Applicant	Second Applicant	Third Applicant

(To be signed by All Applicants if mode of operation is Joint)

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**INSTRUCTIONS FOR ONE TIME MANDATE FORM**

- Investors who have already submitted an NACH/AUTO DEBIT form or already registered for NACH/AUTO DEBIT facility should not submit NACH/AUTO DEBIT form again as NACH/AUTO DEBIT registration is a one-time process only for each bank account. However, if such investors wish to add a new bank account towards OTM facility may fill the form.
- Investors, who have not registered for NACH/AUTO DEBIT facility, may fill the NACH/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/AUTO DEBIT Facility, SIP registration through NACH/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.
- Date and the validity of the mandate should be mentioned in DD/MM/YYYY format
- Please mention the amount in figures and words.
- Please fill all the required details in the Debit Mandate Form for NACH/Auto Debit. The sole/first holder must be one of the holders in the bank account.
- The UMRN, the Sponsor Bank Code and the Utility Code are meant for office use only and need not be filled by the investors.
- The 9 digit MICR and the 11 digit IFSC are mandatory requirements without which your SIP applications will be rejected. You should find these codes on your cheque leaf.

<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](http://www.birlasunlife.com) | E-mail : [connect@birlasunlife.com](mailto:connect@birlasunlife.com) | Contact Centre : 1-800-270-7000/ 1-800-22-7000

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

Scheme Name \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_  
 Scheme Name \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_  
 Amount (₹) \_\_\_\_\_

Request for

Registration of SIP  Registration of CSIP  
 Renewal of SIP  
 Change in Bank Details  
 Additional Micro SIP in same folio  
 OTM Registration