

# COMMON APPLICATION FORM

For Resident Indians and NRIs/FIIs/FPIs



**Birla Sun Life**  
Mutual Fund

(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 No.	Sub Broker Name & ARN/ RIA No.	Sub Broker Code	Employee Unique ID. No. (EUIN)
ARN-9992			

Application No.

EUIN is mandatory for "Execution Only" transactions. Ref. Instruction No. 9

I/we hereby confirm that the EUIN 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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### 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\*\*

AADHAR Card Number  CKYC Number  14 digit CKYC Number   
(Prefix if any)

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

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

AADHAR Card Number  CKYC Number  14 digit CKYC Number   
(Prefix if any)

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

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

AADHAR Card Number  CKYC Number  14 digit CKYC Number   
(Prefix if any)

### 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\*\*

AADHAR Card Number  CKYC Number  14 digit CKYC Number   
(Prefix if any)

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

MODE OF HOLDING (Please tick (✓) ) (Please Refer Instruction No. 2(vi))  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

STATE

PIN CODE

<b>ACKNOWLEDGEMENT SLIP</b> (To be filled in by the Investor)		<b>COMMON APPLICATION FORM</b>		Application No.
		<b>Birla Sun Life Asset Management Company Limited</b> 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 :  /  /

(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 \_\_\_\_\_ I/ 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: [Please tick (✓)]  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)	Cheque Date	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		Scheme Name Plan / Option						
2.	BSL		Scheme Name Plan / Option						
3.	BSL		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 DDMMYY [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 Changer 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				

