

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

COMMON APPLICATION FORM

For Resident Indians and NRIs/FIIs

Application No.

1. EXISTING UNIT HOLDER INFORMATION (Please fill in your Folio No. & Name and then proceed to section 4. Applicable details and Mode of holdings will be as per the existing Folio Number)

Folio No.

DATE OF BIRTH

(Mandatory in case of Minor)

DD

MM

YYYY

NAME OF FIRST / SOLE APPLICANT

Mr. Ms. M/s.

NAME OF GUARDIAN (in case of First / Sole Applicant is a Minor) / CONTACT PERSON & DESIGNATION (in case of non-individual Investors)

Mr. Ms. M/s.

2. STATUS (of First / Sole Applicant)

[Please tick (✓)] Refer Inst. No. 2(iv) for documents to be submitted

- ☐ Individual ☐ Partnership ☐ Club/Society ☐ NRI
☐ HUF ☐ Company ☐ AOP ☐ Trust
☐ Minor through guardian ☐ Body Corporate ☐ BOI ☐ FIIs
☐ Others (please specify)

MODE OF HOLDING

[Please tick (✓)] Refer Inst. No. 2(v)

- ☐ Single
☐ Joint
☐ Anyone or Survivor

OCCUPATION (of First / Sole Applicant)

[Please tick (✓)]

- ☐ Service ☐ Student ☐ Professional
☐ Housewife ☐ Business ☐ Retired
☐ Agriculture
☐ Others (Please Specify)

3. UNIT HOLDER INFORMATION (Refer Instruction 2)

NAME OF THE SECOND APPLICANT

Mr. Ms. M/s.

NAME OF THE THIRD APPLICANT

Mr. Ms. M/s.

MAILING ADDRESS OF FIRST / SOLE APPLICANT (P. O. Box Address may not be sufficient) (Indian Address in case of NRIs/FIIs)

City

State

Pin Code

OVERSEAS ADDRESS (in case NRIs/FIIs) (P. O. Box Address may not be sufficient)

CONTACT DETAILS OF FIRST / SOLE APPLICANT

STD Code

Tele (Office)

Tele (Resi.)

Mobile

Fax

E-Mail

4. PAN & Other DETAILS PAN Details of mandatory, as per SEBI Regulations (Refer Instruction No. 3)

(PAN with supporting OR Form 60/61 with address proof is mandatory for an application amount of Rs. 50,000/- and above)

PAN (with PAN supporting)

OR Form 60/61 (with address proof)

(Provided in this booklet)

FIRST / SOLE APPLICANT / GUARDIAN

OR

☐ (please tick ✓) Form 60/61 attached

SECOND APPLICANT

OR

☐ (please tick ✓) Form 60/61 attached

THIRD APPLICANT

OR

☐ (please tick ✓) Form 60/61 attached

Documents submitted

- ☐ Board Committee Resolution/Authority Letter
☐ Memorandum & Articles of Association ☐ Trust Deed ☐ Partnership Deed ☐ Bye-laws ☐ List of authorised Signatories with names, designations & Specimen Signature ☐ Overseas Auditor's certificate

5. BANK ACCOUNT DETAILS Please note that as per SEBI Regulations it is mandatory for investors to provide bank account details of First / Sole applicant (Refer Instruction 3)

Name of the Bank

Branch

Account No.

Bank Address

Pin

Account Type [Please tick (✓)]

☐ SAVINGS

☐ CURRENT

☐ NRE

☐ NRO

☐ FCNR

☐ NRSR

.... continued overleaf

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor)

Received from Mr / Ms / M/s

Application No.

Sl. No.	*Cheque / DD Favouring Scheme Name	Plan / Option / Sub Option	Amount Invested	Net Amount	Payment Details		Signature & Stamp
					Cheque / DD No.	Bank and Branch	
1			Less DD Charges				
2			Less DD Charges				
3			Less DD Charges				

*All purchases are subject to realisation of Cheque / DD.

6. INVESTMENT DETAILS

No.

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. Details of the same are available on page no. 5, 6, 7 & 8 in the instruction section. (Please refer Instruction No. 8)

Sl. No.	*Cheque / DD Favouring Scheme Name(refer instruction 4)	Plan / Option / Sub Option	Amount Invested	Net Amount Paid	Payment Details		Type of Account #
					Cheque / DD No.	Bank and Branch	
1			Less DD Charges				
2			Less DD Charges				
3			Less DD Charges				

(Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR)

7. REDEMPTION / DIVIDEND REMITTANCE (Refer Instruction no. 7)

Unit holders having bank account with ABN Amro Bank, Citibank, Deutsche Bank, HDFC Bank, HSBC, ICICI Bank, IDBI Bank, Standard Chartered Bank, UTI Bank will receive their Redemption/Dividend Payments (if any) directly into their bank account.

In case Unit holders wish to receive a cheque/demand draft (instead of a direct credit into their bank account), please indicate the preference below:

I/We want to receive the redemption and dividend proceeds (if any) **by way of a cheque.** ☐ (Please ☒ in this box)

ELECTRONIC CLEARING SERVICE (ECS) for Dividends only

I authorise Birla Mutual Fund to credit my dividend payments through ECS

(Please Tick ☒ Yes ☐ No)

Please quote 9 Digit Code No. of your Bank and Branch Corresponding to Bank Account Details given in Section 5 above.

(This number appears on every leaf of your chequebook after your cheque number)

IMPORTANT: Please attach a blank "cancelled" Cheque or a clear photocopy of a cheque issued by your bank verifying of the Code No.

8. E-MAIL COMMUNICATION/ON LINE ACCESS (Refer Instruction no. 9 & 11)

I/We wish to receive the following via e-mail ☐ Account Statement ☐ Quarterly Newsletter & Annual Report ☐ Transaction Confirmation

I would like to get on-line access which is subject to the terms & conditions mentioned in instruction no.11 & I/We agree to abide by the same. ☐ Yes ☐ No

9. NOMINATION (Refer instruction no. 6)

I/We do hereby nominate the person more particularly described hereunder to receive the amount to my / our credit in event of my / our death :

NOMINEE DETAILS

Name : _____

Address : _____

Date of Birth
(In case nominee is minor)

Relationship : _____

Name of Guardian : _____

Address of Guardian : _____

Signature of the Guardian : _____

Unit holder(s) :

Name

Signature

1) _____

2) _____

3) _____

Witness(es) - (could be the same for all unit holders):

Name and Address

Signature

1) _____

2) _____

3) _____

10. DECLARATION

The Trustee, Birla Mutual Fund
Dear Sirs,

Having read and understood the contents of the offer document(s) of the scheme(s), I/We hereby apply to the Trustee of Birla Mutual Fund for units of scheme(s) of Birla Mutual Fund as indicated above and agree to abide by the terms, conditions, rules and regulations of the scheme (s). I/We hereby declare that the particulars given herein are correct and complete. I/We confirm that I/we have not received and will not receive any commission or brokerage or any other incentive in any form, directly or indirectly, for subscribing to units issued under any of the scheme(s).

I/We hereby declare that the amount invested in the scheme(s) is through legitimate sources only and does not involve and is not designed for the purpose of any contravention or evasion of any Act, Rules, Regulations, Notifications or Directions of the provisions of Income Tax Act, 1961, Prevention of Money Laundering Act, 2002, Prevention of Corruption Act, 1988 or any other applicable laws enacted by the Government of India from time to time.

For NRIs/Flis 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 Account/FCNR account/NRO/NRSR Account.

SPECIMEN SIGNATURES(Refer Instruction no.1)

First Applicant

Second Applicant

Third Applicant