



# APPLICATION FORM FOR

## SIP SWP STP

SYSTEMATIC INVESTMENT PLAN    SYSTEMATIC WITHDRAWAL PLAN    SYSTEMATIC TRANSFER PLAN

Distributor Code	Sub-broker Code

**FOLIO NO.**

(For Existing Investors)

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**COMMON APPLICATION FORM NO.**

(For New Investors)

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**Name of the First Applicant**

Mr.	Ms.	M/s.																	
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**PAN DETAILS** (Refer Instruction B-6)

(Mandatory if transaction amount is Rs. 50,000/- or above)

<b>First Applicant</b>																			
<b>Second Applicant</b>																			
<b>Third Applicant</b>																			
<b>Guardian</b> (In case applicant is a minor)																			

To,  
The Trustee, Birla Mutual FundI/We have read and understood the contents of the Offer Document of the respective Scheme(s) and the instruction overleaf. I/We hereby apply for enrolment for the ☐ SIP / ☐ SWP / ☐ STP (please tick ✓ your choice) of the following Scheme/Plan and agree to abide by the terms and conditions of the respective Scheme/Plan.

SCHEME NAME	PLAN	OPTION	SUB OPTION

<b>START DATE :</b>	D	D	/	M	M	/	Y	Y	Y	Y	<b>END DATE :</b>	D	D	/	M	M	/	Y	Y	Y	Y
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**NOTE :** In case the 'End Date' is not mentioned, for SWP / STP, same would continue till unit balance is available in the folio or request to discontinue the same is received, whichever is earlier. As regards SIP, the 'End Date' must coincide with the date of the last cheque.

SYSTEMATIC INVESTMENT PLAN (SIP)*			
INVESTMENT FREQUENCY	INSTRUMENT DETAILS	TOTAL CHEQUES	MINIMUM NO. OF CHEQUES
<b>MONTHLY</b> <input type="checkbox"/> 1st And/Or <input type="checkbox"/> 7th And/Or <input type="checkbox"/> 10th And/Or <input type="checkbox"/> 14th And/Or <input type="checkbox"/> 20th And/Or <input type="checkbox"/> 21st And/Or <input type="checkbox"/> 28th	Cheque Nos. From <input type="text"/> TO <input type="text"/> From <input type="text"/> TO <input type="text"/> Bank & Branch <input type="text"/> Amount per Chq. Rs. <input type="text"/> Rs. in Words <input type="text"/> Total Cheques <input type="text"/> Total Amount <input type="text"/>	<input type="text"/>	<b>A] Monthly SIP :</b> (i) Birla MIP, Birla MIP II & Birla Sunlife Monthly Income : Minimum 6 cheques of Rs. 5000/- each and above. (ii) Other Schemes : Minimum 6 Cheques of Rs. 1000/- each and above <b>OR</b> Minimum 12 cheques of Rs. 500/- each and above. <b>B] Quarterly SIP :</b> (i) Birla MIP, Birla MIP II & Birla Sunlife Monthly Income : Minimum 4 cheques of Rs. 7500/- each and above. (ii) Other Schemes : Minimum 4 Cheques of Rs. 1500/- each and above.
<b>QUARTERLY</b> <input type="checkbox"/> 1st Or <input type="checkbox"/> 7th Or <input type="checkbox"/> 10th Or <input type="checkbox"/> 14th Or <input type="checkbox"/> 20th Or <input type="checkbox"/> 21st Or <input type="checkbox"/> 28th			

SYSTEMATIC WITHDRAWAL PLAN (SWP)			
<b>WITHDRAWAL FREQUENCY</b> (Applicable for fixed withdrawals only) <input type="checkbox"/> 1ST OF EACH MONTH <b>AND / OR</b> <input type="checkbox"/> 10TH OF EACH MONTH <b>AND / OR</b> <input type="checkbox"/> 20TH OF EACH MONTH	<input type="checkbox"/> <b>FIXED WITHDRAWAL</b> <b>AMOUNT PER INSTALMENT</b> RS. <input type="text"/> (Minimum Rs. 500/- and in multiples of Rs 1/- thereafter) No. of SWP <input type="text"/> Total Amt. of SWP <input type="text"/>	<input type="checkbox"/> <b>MONTHLY</b> (Min. 6 Withdrawals) <b>OR</b> <input type="checkbox"/> <b>QUARTERLY</b> (Min. 4 Quarters) <b>RS. IN WORDS</b> _____	<input type="checkbox"/> <b>APPRECIATION WITHDRAWAL</b> <input type="checkbox"/> <b>MONTHLY</b> (Distributed only on 1st of the following month) <b>OR</b> <input type="checkbox"/> <b>QUARTERLY</b> (Distributed only on 1st of the following month)

SYSTEMATIC TRANSFER PLAN (STP)			
<b>TRANSFER FREQUENCY</b> <input type="checkbox"/> <b>MONTHLY</b> (Min. 12/6 transfers) <b>OR</b> <input type="checkbox"/> <b>QUARTERLY</b> (Min. 4 quarters) <input type="checkbox"/> 1ST OF EACH MONTH <b>AND / OR</b> <input type="checkbox"/> 1ST OF EACH QUARTER <input type="checkbox"/> 10TH OF EACH MONTH <b>AND / OR</b> <input type="checkbox"/> 10TH OF EACH QUARTER <input type="checkbox"/> 20TH OF EACH MONTH <input type="checkbox"/> 20TH OF EACH QUARTER	<b>SCHEME</b> <input type="text"/> <b>PLAN</b> <input type="text"/> <b>OPTION</b> <input type="text"/> <b>MINIMUM TRANSFER AMOUNT :</b> A. Monthly Plan : Minimum of Rs. 500/- each and above for 12 transfers <b>OR</b> Rs. 1000/- each and above for 6 transfers. B. Quarterly Plan : Minimum of Rs. 1500/- each and above for minimum 4 quarters.	<b>AMOUNT PER TRANSFER</b> RS. <input type="text"/> <b>WORDS</b> _____ No. of Transfers <input type="text"/> Total Amt. of Transfer <input type="text"/>	

SPECIMEN SIGNATURES	FIRST APPLICANT	SECOND APPLICANT	THIRD APPLICANT

Acknowledgement Slip (To be filled in by the Investor)			
Received from Mr / Ms / M/s _____			Signature & Stamp
<b>FOLIO NO.</b> (For Existing Investor)	<b>COMMON APPLICATION FORM NO.</b> (For New Investor)		
<b>FREQUENCY</b> <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly	<input type="checkbox"/> 1st And/Or <input type="checkbox"/> 7th And/Or <input type="checkbox"/> 10th And/Or <input type="checkbox"/> 14th And/Or <input type="checkbox"/> 20th And/Or <input type="checkbox"/> 21st And/Or <input type="checkbox"/> 28th		
<b>REQUEST FOR</b> <input type="checkbox"/> SIP* <input type="checkbox"/> SWP <input type="checkbox"/> STP	<b>Start Date</b> <input type="text"/>	<b>End Date</b> <input type="text"/>	

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

Note : Please refer instruction overleaf for more details.