

|                                    |
|------------------------------------|
| Sole/First Holder : _____          |
| Second Holder : _____              |
| Third Holder : _____               |
| Common A/c No.: _____ Date : _____ |

**Systematic Investment Plan (SIP)**

I/We would like to enrol for SIP

Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

Bank Code \_\_\_\_\_ Bank A/c No \_\_\_\_\_

Bank Name & Branch \_\_\_\_\_

No. of Cheques (at least 6)\* \_\_\_\_\_ Amount Per Cheque Rs \_\_\_\_\_ Total Amount Rs \_\_\_\_\_

Frequency ☐ Monthly ☐ Quarterly Cheque Nos. \_\_\_\_\_

Start Month \_\_\_\_\_ SIP Date ☐ 1st ☐ 5th ☐ 15th ☐ 25th (the date on which you want to invest)

*Pls. Note:* If you would like to opt for SIP Auto Debit Facility, please fill the form on pg. 29 in lieu of this form.

**Systematic Withdrawal Plan (SWP)**

I/We would like to enrol for SWP

Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

Start Month \_\_\_\_\_ End Month (optional)<sup>§</sup> \_\_\_\_\_

Frequency ☐ Monthly ☐ Quarterly ☐ Semi-annual ☐ Annual SWP Amount \_\_\_\_\_

SWP date ☐ 1st ☐ 11th ☐ 21st (the date of the month on which you want to withdraw)

**Switch / Systematic Transfer Plan (SSTP)**

I/We would like to switch \_\_\_\_\_ units or Rs (in figures) \_\_\_\_\_ Rs (in words) \_\_\_\_\_

To : Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

Start Month \_\_\_\_\_ End Month (optional)<sup>§</sup> \_\_\_\_\_

**For Systematic Transfer Plan Only** (Atleast 6 Transfers):

Frequency ☐ Monthly ☐ Quarterly ☐ Semi-annual ☐ Annual SSTP Amount \_\_\_\_\_

SSTP date ☐ 1st ☐ 11th ☐ 21st (the date of the month on which you want to do SSTP)

\* Cheques to be dated as per the SIP date selected

§ If not specified, it will continue till availability of funds in the said account.

\_\_\_\_\_  
Signature of 1st Holder

\_\_\_\_\_  
Signature of 2nd Holder

\_\_\_\_\_  
Signature of 3rd Holder