# APPLICATION FORM FOR

**SIP** SYSTEMATIC INVESTMENT PLAN | **SWP** SYSTEMATIC WITHDRAWAL PLAN | **STP** SYSTEMATIC TRANSFER PLAN

| Distributor Code | Sub-broker Code |
|---|---|
| ARN-3852 | |

Birla Sun Life Mutual Fund

**FOLIO NO.** (For Existing Investors) | **COMMON APPLICATION FORM NO.** (For New Investors)

**Name of the First Applicant** — Mr. / Ms. / M/s.

**PAN DETAILS** (Refer Instruction B-6) (Mandatory if transaction amount is Rs. 50,000/- or above)

First Applicant | Second Applicant | Third Applicant | Guardian (In case applicant is a minor)

To,
The Trustee, Birla Mutual Fund

I/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 |
|---|---|---|---|
| | | | |

**START DATE :** D D M M Y Y Y Y **END DATE :** D D M M Y Y Y Y

**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

**MONTHLY**

☐ 1st And/Or ☐ 7th And/Or ☐ 10th And/Or
☐ 14th And/Or ☐ 20th And/Or ☐ 21st And/Or
☐ 28th

**QUARTERLY**

☐ 1st Or ☐ 7th Or ☐ 10th Or
☐ 14th Or ☐ 20th Or ☐ 21st Or
☐ 28th

### INSTRUMENT DETAILS

| | | | TOTAL CHEQUES |
|---|---|---|---|
| Cheque Nos. From | | TO | |
| From | | TO | |
| Bank & Branch | | | |
| Amount per Chq. Rs. | | Rs. in Words | |
| Total Cheques | | Total Amount | |

**MINIMUM NO. OF CHEQUES**
**A]** Monthly SIP :
*(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 **OR** Minimum 12 cheques of Rs. 500/- each and above.
**B]** Quarterly SIP :
*(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.

## SYSTEMATIC WITHDRAWAL PLAN (SWP)

### WITHDRAWAL FREQUENCY

(Applicable for fixed withdrawals only)

☐ 1ST OF EACH MONTH
**AND / OR**
☐ 10TH OF EACH MONTH
**AND / OR**
☐ 20TH OF EACH MONTH

☐ **FIXED WITHDRAWAL** — ☐ **MONTHLY** (Min. 6 Withdrawals) **OR** ☐ **QUARTERLY** (Min. 4 Quarters)

**AMOUNT PER INSTALMENT**
**RS.** _____ **RS. IN WORDS** _____

(Minimum Rs. 500/- and in multiples of Rs 1/- thereafter)

No. of SWP ☐ Total Amt. of SWP

**OR**

☐ **APPRECIATION WITHDRAWAL**
- ☐ **MONTHLY** (Distributed only on 1st of the following month)

**OR**

- ☐ **QUARTERLY** (Distributed only on 1st of the following month)

## SYSTEMATIC TRANSFER PLAN (STP)

### TRANSFER FREQUENCY

☐ **MONTHLY** (Min. 12/6 transfers)
- ☐ 1ST OF EACH MONTH **AND / OR**
- ☐ 10TH OF EACH MONTH **AND / OR**
- ☐ 20TH OF EACH MONTH

**OR**

☐ **QUARTERLY** (Min. 4 quarters)
- ☐ 1ST OF EACH QUARTER **OR**
- ☐ 10TH OF EACH QUARTER **OR**
- ☐ 20TH OF EACH QUARTER

**SCHEME** _____

**PLAN** _____ **OPTION** _____

**MINIMUM TRANSFER AMOUNT : A. Monthly Plan :** Minimum of Rs. 500/- each and above for 12 transfers **OR** Rs. 1000/- each and above for 6 transfers. **B. Quarterly Plan :** Minimum of Rs. 1500/- each and above for minimum 4 quarters.

**AMOUNT PER TRANSFER**
**RS.** _____
**WORDS** _____

No. of Transfers ☐
Total Amt. of Transfer

| SPECIMEN SIGNATURES | FIRST APPLICANT | SECOND APPLICANT | THIRD APPLICANT |
|---|---|---|---|
| | | | |

## Acknowledgement Slip (To be filled in by the Investor)

**Received from Mr / Ms / M/s** _____

**FOLIO NO.** (For Existing Investor) | **COMMON APPLICATION FORM NO.** (For New Investor)

Signature & Stamp

**FREQUENCY** ☐ Monthly ☐ Quarterly — ☐ 1st And/Or ☐ 7th And/Or ☐ 10th And/Or ☐ 14th And/Or ☐ 20th And/Or ☐ 21st And/Or ☐ 28th

**REQUEST FOR** ☐ SIP* ☐ SWP ☐ STP Start Date _____ End Date _____

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