

Investment Advisor's Name & Code	Sub-Broker's Code	Systematic Transfer / Withdrawal Form
ARN-3852		Strike off sections that are not applicable

Investor's Information

Account No. <i>(For Existing Investors)</i>	Application No. <i>(For New Investors, Please attach the application form)</i>
Name of Sole/ First Holder	
E Mail Id	

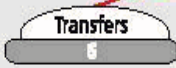

I would like to opt for **Systematic Transfer Plan** **Systematic Withdrawal Plan**

Scheme _____	Plan _____	Option (Please ✓)	<input type="checkbox"/> Growth <input type="checkbox"/> Bonus <i>(Available only in Kotak Bond Regular)</i> <input type="checkbox"/> Dividend <input checked="" type="checkbox"/> Payout OR <input type="checkbox"/> Reinvestment Dividend Frequency _____
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Frequency (Please ✓) <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <i>(Available only for STP)</i>	Commencement Date
Date <input type="radio"/> 1 st <input type="radio"/> 7 th <input type="radio"/> 14 th <input type="radio"/> 21 st	Period From _____ To _____

Systematic Transfer Plan (STP)

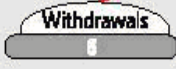
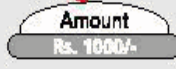
To	Scheme _____	Plan _____	Option (Please ✓)
<input type="checkbox"/> Growth <input type="checkbox"/> Bonus <i>(Available only in Kotak Bond Regular)</i> <input type="checkbox"/> Dividend <input checked="" type="checkbox"/> Payout OR <input type="checkbox"/> Reinvestment Dividend Frequency _____			

Transfer Option (Please ✓)	Check List →
<input type="checkbox"/> Fixed Sum <input style="width:150px;" type="text"/> OR <input type="checkbox"/> Entire Appreciation	<div style="text-align: center;">Minimum Criteria</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  Transfers 6 </div> <div style="text-align: center;">  Amount Rs. 1000/- </div> </div> <ul style="list-style-type: none"> <input type="checkbox"/> Your choice of transfer option is clearly indicated. <input type="checkbox"/> STP period, date & frequency is mentioned above. <input type="checkbox"/> Scheme (Plan) - Option from & to which you wish to transfer is clearly indicated.

PAN*			
Enclosed (Please ✓)	<input type="checkbox"/> PAN Proof or <input type="checkbox"/> Form 60/61	<input type="checkbox"/> PAN Proof or <input type="checkbox"/> Form 60/61	<input type="checkbox"/> PAN Proof or <input type="checkbox"/> Form 60/61

* Mandatory if each systematic transfer amount is >= Rs. 50,000/- . In case of minor, Please mention the PAN details of the Guardian.

Systematic Withdrawal Plan (SWP)

Withdrawal Option (Please ✓)	Check List →
<input type="checkbox"/> Fixed Sum <input style="width:150px;" type="text"/> OR <input type="checkbox"/> Entire Appreciation	<div style="text-align: center;">Minimum Criteria</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  Withdrawals 6 </div> <div style="text-align: center;">  Amount Rs. 1000/- </div> </div> <ul style="list-style-type: none"> <input type="checkbox"/> Your choice of withdrawal option is clearly indicated. <input type="checkbox"/> SWP period, date & frequency is mentioned above.

Declaration and Signatures

I/We have read and understood the contents of the Offer Document(s) of the above referred Scheme(s) of Kotak Mahindra Mutual Fund. I/We hereby apply for allotment/purchase of Units in the Scheme(s) indicated as above and agree to abide by the terms and conditions applicable thereto. I/We hereby declare that I/We are authorized to make this investment in the above mentioned Scheme(s) and that the amount invested in the Scheme(s) is through legitimate sources only 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, Anti Money Laundering Act, Anti Corruption Act or any other applicable laws enacted by the Government of India from time to time. I/We hereby authorize Kotak Mahindra Mutual Fund, its Investment Manager and its agents to disclose details of my investment to my/our Investment Advisor and/or banks.

I/We have neither received nor been induced by any rebate or gifts, directly or indirectly, in making this investment.

 Sole/First Applicant	 Second Applicant	 Third Applicant
To be signed by All Applicants if mode of operation is "Joint".		

SIGNATURE(S)