

COMMON APPLICATION FORM

For Resident Indians and NRIs/FIs/FPIs



Birla Sun Life
Mutual Fund

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. All sections to be completed in ENGLISH in BLACK / BLUE COLOURED INK and in BLOCK LETTERS.)

Distributor Name / ARN No.	Sub Broker Name / ARN No.	Sub Broker Code	Employee Unique ID. No. (EJIN)	Application No.

EJIN is mandatory for "Execution Only" transactions. Ref. Instruction No. 9

I/we hereby confirm that the EJIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker.

First Applicant / Authorised Signatory	Second Applicant	Third Applicant

TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTORS/AGENTS ONLY (Refer Instruction 1 (viii))

In case the subscription (lumpsum) amount is ₹ 10,000/- or more and your Distributor has opted to receive Transaction Charges, ₹ 150/- (for first time mutual fund investor) or ₹ 100/- (for investor other than first time mutual fund investor) will be deducted from the subscription amount and paid to the distributor. Units will be issued against the balance amount invested.

EXISTING UNITHOLDER please fill in your Folio No., Name & Email ID and then proceed to Section 5 (Applicable details and Mode of holding will be as per the existing Folio No.)

Existing Folio No.

1. FIRST / SOLE APPLICANT INFORMATION (MANDATORY) (Refer Instruction No. 2,3,4) Fresh / New Investors fill in all the blocks. (1 to 10) In case of investment "On behalf of Minor", Please Refer Instruction no. 2(ii)

NAME OF FIRST / SOLE APPLICANT Mr. Ms. M/s.

PAN / PEKRN (Mandatory) Date of Birth** KYC

AADHAR Card Number

NAME OF THE SECOND APPLICANT Mr. Ms. M/s.

PAN / PEKRN (Mandatory) Date of Birth** KYC

AADHAR Card Number

NAME OF THE THIRD APPLICANT Mr. Ms. M/s.

PAN / PEKRN (Mandatory) Date of Birth** KYC

AADHAR Card Number

NAME OF THE GUARDIAN (In case First / Sole Applicant is minor) / CONTACT PERSON - DESIGNATION / PoA HOLDER (In case of Non-individual Investors)

Mr. Ms. M/s.

PAN / PEKRN (Mandatory) Date of Birth** KYC

AADHAR Card Number

RELATIONSHIP OF GUARDIAN (Refer Instruction No. 2(ii))

ISD CODE TEL: OFF.

TEL: RESI

Proof of the Relationship with Minor** ** Mandatory in case the First / Sole Applicant is Minor

TAX STATUS (Please tick (✓)) (Applicable for First / Sole Applicant)

Resident Individual Fils NRI - NRO HUF Club / Society PIO Body Corporate Minor Government Body
 Trust NRI - NRE Bank & FI Sole Proprietor Partnership Firm QFI Others

MODE OF HOLDING (Please tick (✓)) (Please Refer Instruction No. 2(v)) Joint Single Anyone or Survivor (Default option is Anyone or survivor)

MAILING ADDRESS OF FIRST / SOLE APPLICANT (P.O.Box Address is not sufficient. Please provide full address.) (Indian Address in case of NRIs/FIs)

CITY		
STATE		PIN CODE

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor)

COMMON APPLICATION FORM



Birla Sun Life Asset Management Company Limited

One India Bulls Centre, Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013

Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 567679 | Email: connect@birlasunlife.com

Application No.

Collection Centre /
BSLAMC Stamp & Signature

Received from Mr. / Ms. Date : / /

(Please tick (✓)) ENCLOSED PAN/PEKRN Proof KYC Complied NECS Form Yes No

2. GO GREEN (Please tick (✓)) (Refer Instruction No. 10)

SMS Transact Online Access **Mobile No.** +91 / We would like to register for my/our SMS Transact and/ or Online Access

Email Id

Default Communication mode is E-mail only, if you wish to receive following document(s) via physical mode: Account Statement Annual Report Other Statutory Information

Facebook Id **Twitter Id**

3. BANK ACCOUNT DETAILS (Please note that as per SEBI Regulations it is mandatory for investors to provide their bank account details) Refer Instruction No. 3(A)

Name of the Bank

Branch Address

Pin Code City

Account No.

Account Type SAVINGS CURRENT NRE NRO FCNR OTHERS (please specify)

11 Digit IFSC Code 9 Digit MICR Code

4. INVESTMENT DETAILS (Please tick (✓)) (Refer Instruction No. 5, 9 & 14) (If this section is left blank, only folio will be created)

Separate cheque/ demand draft must be issued for each investment drawn in favour of respective scheme name and the instrument should be crossed "A/c Payee Only".
Please write appropriate scheme name as well as the Plan/Option/Sub Option

S. No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (applicable only for Dividend option)	Amount Invested (₹)	^DD Charges	Net Amount Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch and Account Number
1.	BSL		Scheme Name					
			Plan / Option					

(Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR) *All purchases are subject to realization of funds ^Refer to Instruction No. 5 (vi)

KYC DETAILS (Mandatory)

OCCUPATION (Please tick (✓))

FIRST APPLICANT	<input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others (please specify)
SECOND APPLICANT	<input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others (please specify)
THIRD APPLICANT	<input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others (please specify)

GROSS ANNUAL INCOME (Please tick (✓))

FIRST APPLICANT	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> > 25 Lacs - 1 Crore <input type="checkbox"/> > 1 Crore Net worth (Mandatory for Non - Individuals Rs. _____ as on DDMM [Not older than 1 year]
SECOND APPLICANT	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> > 25 Lacs - 1 Crore <input type="checkbox"/> > 1 Crore OR Net Worth _____
THIRD APPLICANT	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> > 25 Lacs - 1 Crore <input type="checkbox"/> > 1 Crore OR Net Worth _____

For Individuals **For Non-Individual Investors (Companies, Trust, Partnership etc.)**

<input type="checkbox"/> I am Politically Exposed Person <input type="checkbox"/> I am Related to Politically Exposed Person <input type="checkbox"/> Not Applicable	Is the company a Listed Company or Subsidiary of Listed Company or Controlled by a Listed Company: <input type="checkbox"/> Yes <input type="checkbox"/> No (If No, please attach mandatory UBO Declaration) Foreign Exchange / Money Changer Services <input type="checkbox"/> Yes <input type="checkbox"/> No Gaming / Gambling / Lottery / Casino Services <input type="checkbox"/> Yes <input type="checkbox"/> No Money Lending / Pawning <input type="checkbox"/> Yes <input type="checkbox"/> No
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S. No.	Scheme Name	Plan / Option	Net Amount Paid (₹)	Payment Details	
				Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch
1.	BSL				

5. DEMAT ACCOUNT DETAILS (OPTIONAL) (Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c. held with the depository participant.) Refer Instruction No. 3(B)

NSDL: Depository Participant Name: _____ DPID No.: I N Beneficiary A/c No.

CDSL: Depository Participant Name: _____ Beneficiary A/c No.

Enclosed: Client Master Transaction/ Statement Copy/ DIS Copy

6. NOMINATION DETAILS (Mandatory) (Refer Instruction No. 7)

I/We wish to nominate I/We DO NOT wish to nominate and sign here 1st Applicant Signature (Mandatory)

	Nominee Name and Address	Guardian Name (in case of Minor)	Allocation %	Nominee/ Guardian Signature
Nominee 1			100%	

To register multiple nominee please fill separate Multiple nomination Form.

7. FATCA & CRS INFORMATION [Please tick (✓)] For Individuals & HUF (Mandatory) Non Individual investors should mandatorily fill separate FATCA detail form

The below information is required for all applicant(s)/ guardian

Address Type: Residential or Business Residential Business Registered Office (for address mentioned in form/existing address appearing in Folio)

Is the applicant(s)/ guardian's Country of Birth / Citizenship / Nationality / Tax Residency other than India? Yes No

If Yes, please provide the following information [mandatory]

Please indicate all countries in which you are resident for tax purposes and the associated Tax Reference Numbers below.

Category	First Applicant (including Minor)	Second Applicant/ Guardian	Third Applicant
Name of Applicant			
Place/ City of Birth			
Country of Birth			
Country of Tax Residency#			
Tax Payer Ref. ID No [^]			
Identification Type [TIN or other, please specify]			
Country of Tax Residency 2			
Tax Payer Ref. ID No. 2			
Identification Type [TIN or other, please specify]			
Country of Tax Residency 3			
Tax Payer Ref. ID No. 3			
Identification Type [TIN or other, please specify]			

#To also include USA, where the individual is a citizen/ green card holder of USA. [^]In case Tax Identification Number is not available, kindly provide its functional equivalent.

8. DECLARATION(S) & SIGNATURE(S) (Refer Instruction No. 1)

To, Date
The Trustee,
Birla Sun Life Mutual Fund

Having read and understood the contents of the Statement of Additional Information / Scheme Information Document of the Scheme, I/We hereby apply for units of the scheme and agree to abide by the terms, conditions, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate sources only and does not involve and is not designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the government of India from time to time. I/We have understood the details of the scheme & I/we have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment.

For Non-Individual Investors: I/We hereby confirm that the object clause of the constitution document of the entity (viz. MOA / AOA / Trust Deed, etc.), allows us to apply for investment in this scheme of Birla Sun Life Mutual fund and the application is being made within the limits for the same. I/We are complying with all requirements / conditions of the entity while applying for the investments and I/We, including the entity, if the case may arise so, hereby agree to indemnify BSLAMC / BSLMF in case of any dispute regarding the eligibility, validity and authorization of the entity and/or the applicants who have applied on behalf of the entity.

For NRIs 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 /Non-Resident Ordinary /FCNR account. (Refer Inst. No. 6)

I/We confirm that details provided by me/us are true and correct.

*I have voluntarily subscribed to the on-line access for transacting through the internet facility provided by Birla Sun Life Asset Management Company Ltd. (Investment Manager of Birla Sun Life Mutual Fund) and confirm of having read, understood and agree to abide the terms and conditions for availing of the internet facility more particularly mentioned on the website www.birlasunlife.com and hereby undertake to be bound by the same. I further undertake to discharge the obligations cast on me and shall not at any time deny or repudiate the on-line transactions effected by me and I shall be solely liable for all the costs and consequences thereof.

The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

FATCA & CRS Declaration: I/ We have understood the information requirements of this Form (read along with FATCA & CRS Instructions) and hereby confirm that the information provided by me/ us on this Form is true, correct, and complete. I/ We also confirm that I/ We have read and understood the FATCA & CRS Terms and Conditions and hereby accept the same. (Refer Inst. No. 14)

Signature of First Applicant / Authorised Signatory	Signature of Second Applicant	Signature of Third Applicant
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SYSTEMATIC INVESTMENT APPLICATION FORM

SIP (WITH MICRO SIP) / CENTURY SIP



INVESTMENT THROUGH NACH/ECS/NECS/RECS/AUTO DEBIT/PDC.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. PLEASE ENSURE COMPLETION OF SECTION 4 IN CASE OF CENTURY SIP)

Investment Advisor's Name & ARN	Sub-Broker's Name & ARN No.	Official Acceptance Point Stamp & Sign	Employee Unique ID. No. (EUN)
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EUN is mandatory for "Execution Only" transactions. Ref. Instruction No. G-3

I/we hereby confirm that the EUN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker.

First Applicant / Authorised Signatory	Second Applicant	Third Applicant
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Request for Registration of SIP Registration of CSIP Renewal of SIP Change in Bank Details Additional Micro SIP in same folio Date

D	D	M	M	Y	Y	Y	Y
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TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTORS/AGENTS ONLY (Refer Instruction G (9))

In case of subscriptions through SIPs, transaction charge of ₹ 150/- (for first time mutual fund investor) or ₹ 100/- (for investor other than first time mutual fund investor) will be deducted and paid to your distributor if opted to receive the transaction charges. In such cases the transaction charge shall be recovered in 3-4 installments but only where total commitment (i.e. amount per SIP installment x No. of installments) amounts to ₹ 10,000/- or more. Units will be issued against the balance of the installment amounts invested.

Existing Investor Folio No. Application No. (New Folio will be Generated for CSIP)

1. FIRST / SOLE APPLICANT INFORMATION (MANDATORY)

Mobile No. Email Id

NAME OF FIRST / SOLE APPLICANT Mr. Ms. M/s.

NAME OF THE SECOND APPLICANT Mr. Ms. M/s.

NAME OF THE THIRD APPLICANT Mr. Ms. M/s.

Applicant	PAN* (Mandatory)	KYC Mandatory	Date of birth**	Document Type* (Photo Id/ Address Proof)	Document No.* (Mandatory for Micro SIP, not for additional Micro SIP in same folio)								
Sole / First Applicant		<input type="checkbox"/>	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y		
D	D	M	M	Y	Y	Y	Y						
Second Applicant		<input type="checkbox"/>	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y		
D	D	M	M	Y	Y	Y	Y						
Third Applicant		<input type="checkbox"/>	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y		
D	D	M	M	Y	Y	Y	Y						
Guardian/POA Holder		<input type="checkbox"/>	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y		
D	D	M	M	Y	Y	Y	Y						

Ref. Instruction No. G-2 *For Micro SIP Only ** Mandatory in case the First/Sole Applicant is Minor

NAME OF THE GUARDIAN (In case of minor) / CONTACT PERSON - DESIGNATION / PoA HOLDER (In case of Non-individual Investors)

Mr. Ms. M/s.

RELATIONSHIP OF GUARDIAN (Refer to Instruction No. E.24)

2. INVESTMENT DETAILS (PLEASE REFER INSTRUCTIONS D & F-1 FOR INFORMATION ON ELIGIBLE SCHEMES. ONLY ONE SCHEME PER APPLICATION FORM)

Separate cheque/ demand draft must be issued for each investment drawn in favour of respective scheme name and the instrument should be crossed "A/c Payee Only". Please write appropriate scheme name as well as the Plan/Option/Sub Option

S. No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (Refer G-4) (applicable only for Dividend option)	Amount Invested (₹)	^DD Charges	Net Amount Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch and Account Number
1.	BSL							

(Type of Account : Saving / Current / NRE / NRO / FCNR / NRSR) *All purchases are subject to realization of funds ^Refer to Instruction No. 5 (vi)

(Please tick (✓) any ONE of the below as your Installment amount OR enter the amount of your choice. In case of multiple entries, the highest amount will be chosen.

Each Installment Amount (₹) ₹ 20,000/- ₹ 10,000/- ₹ 6,000/- ₹ 3,000/- Amount

3. DEBIT MANDATE - NACH/ECS/DIRECT DEBIT/ONE TIME MANDATE [Applicable for Lumpsum Additional Purchases as well as SIP Registrations] Please attach a cancelled cheque/cheque copy.

UMRN

D	D	M	M	Y	Y	Y	Y
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 Date

D	D	M	M	Y	Y	Y	Y
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(tick ✓) CREATE MODIFY CANCEL Sponsor Bank Code Utility Code

I/We hereby authorize: **BIRLA SUN LIFE MUTUAL FUND** to debit (tick ✓) SB / CA / CC / SB-NRE / SB-NRO / Other

Bank A/c No.:

With Bank: Bank Name & Branch IFSC OR MICR

an amount of Rupees ₹

FREQUENCY Yearly As & when presented DEBIT TYPE Fixed Amount Maximum Amount

Reference 1 Folio No: Mobile

Reference 2 AppIn No: Email:

I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of bank.

PERIOD From

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

 to

3	1	1	2	2	0	9	9
---	---	---	---	---	---	---	---

 or Until Cancelled

1. Sign 2. Sign Sign

Name as in bank records (mandatory) Name as in bank records (mandatory) Name as in bank records (mandatory)

*This is to confirm that the declaration has been carefully read, understood & made by me/us. I am authorizing Birla Sun Life Mutual Fund to debit my account. I have understood that I am authorized to cancel/ amend this mandate by appropriately communicating the cancellation/ amendment request to Birla Sun Life Mutual Fund or the bank where I have authorised the debit For Debit Mandate: I/We hereby declare that the particulars given on this mandate are correct and complete and express my willingness and authorize to make payments referred above through participation in NACH/ECS/Direct Debit/ Standing Instructions. I/We hereby confirm adherence to the terms of NACH/ECS/NECS/RECS/AUTO DEBIT Facility offered by Birla Sun Life Mutual Fund and as amended from time to time and of NACH/ECS (Debits)/Direct Debits/ Standing Instructions. The AMC would not be liable for any delay in crediting the scheme collection accounts by the Service Providers which may result in a delay in application of NAV. This is to confirm that the declaration has been carefully read, understood and made by me/us. **Authorisation to Bank:** This is to inform that I/We have registered for ECS / NACH (Debit Clearing) / Direct Debit / Standing instructions facility and that my/our payment towards my/our investment in Birla Sun Life Mutual Fund shall be made from my/our above mentioned bank account with your Bank. I/We authorize the representatives of Birla Sun Life Mutual Fund carrying this mandate form to get it verified and executed. I/We authorize the bank to debit my account for any charges towards mandate verification, registration, transactions, returns, etc., as applicable.

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) SYSTEMATIC INVESTMENT THROUGH NACH/ NECS / DIRECT DEBIT / PDC FACILITY APPLICATION FORM

Application No.



Birla Sun Life Asset Management Company Limited

One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013
Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 567679 | Email: connect@birlasunlife.com

Collection Centre / BSLAMC Stamp & Signature

Received from Mr. / Ms.

Date : / /

2. INVESTMENT DETAILS (PLEASE REFER INSTRUCTIONS D & F-1 FOR INFORMATION ON ELIGIBLE SCHEMES. ONLY ONE SCHEME PER APPLICATION FORM)

Contd...

First Installment through Cheque / DD. (MANDATORY FOR CSIP)		1st Cheque / DD No. _____	1st Cheque Dated	D	D	/	M	M	/	Y	Y	Y	Y								
Drawn on Bank	_____		Amount (₹) (in figures)	_____																	
Branch	_____		City	_____																	
For PDC	Cheques dates From:	D	D	/		/	Y	Y	Y	Y	To	D	D	/	M	M	/	Y	Y	Y	Y
	Cheque No. From:	_____		To	_____																
Investment Start Date	D	D	M	M	Y	Y	Y	Y	Frequency	MONTHLY (max 4 debit dates) (Only one date for CSIP and Step Up SIP)											
Investment Dates	1st	7th	10th	15th	20th	28th															

At Birla Sun Life Mutual Fund, we provide YOU the flexibility to discontinue your SIP at ANYTIME. Call us at 1800-270-7000/1800-22-7000 or email us at connect@birlasunlife.com to know how.

Default End Date (31st December 2099) ^ **SELECT YOUR SIP PERIOD** Refer Instruction E-11 & F-5

Till you instruct Birla Sun Life Mutual Fund to discontinue your SIP OR Enter SIP End Date D D / M M / Y Y / Y Y

CSIP Tenure (Insurance cover would be as per 1st installment): 55 years - Your Current Age _____ years = _____ years Frequency: Monthly Only.

^ For Regular SIP - "Default end date is December 31, 2099. In case the 'End Date' is not mentioned by the investor in the Form, the same would be considered as 31st December, 2099 by default". For CSIP - refer instruction F5

STEP-UP SIP (OPTIONAL - and available only for SIP/CSIP Investments through NECS) (Refer Instruction E-25)

Amount (Default of ₹ 500/-) ₹ 500/- ₹ 1,000/- Amount (In multiples of ₹ 500/-) _____ **STEP-UP SIP Frequency** (Default Yearly) Half Yearly Yearly

4. FOR CENTURY SIP (Please read detailed Terms & Conditions for availing CSIP) Mandatory

Date of Birth D D / M M / Y Y / Y Y GENDER MALE FEMALE

NOMINATION DETAILS (Refer Instruction No. F-14) **Nomination as stated below, shall be considered and prevail over nomination details provided in Common Application Form.**

I/We do hereby nominate the undermentioned Nominee to receive the units to my/ our credit in this folio no. in the event of my/ our death. I/ We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the AMC / Mutual Fund / Trustees.

Nominee Name : _____ **Date Of Birth** (in case of minor): ____ / ____ / ____

Relationship : _____ **Guardian / Parent Name** (in case of minor): _____

Address : _____

Signature of Nominee or Parent / Guardian

5. DEMAT ACCOUNT DETAILS (OPTIONAL) (Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c. held with the depository participant.) Refer Instruction No. E (27)

NSDL: Depository Participant Name: _____ DPID No.: I N _____ Beneficiary A/c No. _____

CDSL: Depository Participant Name: _____ Beneficiary A/c No. _____

6. DECLARATION(S) & SIGNATURE(S)

I/We hereby authorise Birla Sun Life Mutual Fund and their authorised service provider to debit the above bank account by NACH/ ECS/ NECS/ RECS/ Auto Debit/PDC Clearing for collection of SIP payments. I/We understand that the information provided by me/us may be shared with third parties for facilitating transaction processing through NACH/ ECS/ NECS/ RECS/ Auto Debit/PDC Clearing or for compliance with any legal or regulatory requirements. I/We hereby declare that the particulars given above are correct and complete and express my/our willingness to make payments referred above through participation in NACH/ ECS/ NECS/ RECS/ Auto Debit/PDC Clearing. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We will not hold BSLAMC/MF or their appointed service providers or representatives responsible. I/We will also inform, about any changes in my bank account immediately. I/We undertake to keep sufficient funds in the funding account on the date of execution of standing instruction. I/We have read and agreed to the terms and conditions mentioned overleaf. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

For Century SIP: I/We hereby opt for Birla Sun Life Century SIP and agree and confirm to have read, understood and accepted the Terms and Conditions of Century SIP and Insurance Cover. **For Micro SIP only:** I hereby declare that I do not have any existing Micro SIPs which together with the current application in rolling 12 month period or in financial year i.e. April to March will result in aggregate investments exceeding ₹ 50,000 in a year. I/ we am / are aware and understand that if, at the time of availing the Micro SIP, I/ we hold a valid Permanent Account Number (PAN) issued by the Income Tax Department of India, a KYC acknowledgment letter issued by CDSL Ventures Limited would have to be submitted by me / us to MF/AMC. Accordingly I/ we understand and agree that I/ we shall be responsible for the consequences of non-submission of the same, if any. (refer Instruction no: E-23)

Signature(s)	Name of First Unit Holder (As in Bank Records)	Name of Second Unit Holder (As in Bank Records)	Name of Third Unit Holder (As in Bank Records)
	First Applicant	Second Applicant	Third Applicant

(To be signed by All Applicants if mode of operation is Joint)

H. INSTRUCTIONS FOR DEBIT MANDATE FORM NACH/ECS/DIRECT DEBIT

- Investors who have already submitted an NACH/ECS/NECS/RECS/AUTO DEBIT form or already registered for NACH/ECS/NECS/RECS/AUTO DEBIT facility should not submit NACH/ECS/NECS/RECS/AUTO DEBIT form again as NACH/ECS/NECS/RECS/AUTO DEBIT registration is a one-time process only for each bank account.
- Investors, who have not registered for NACH/ECS/NECS/RECS/AUTO DEBIT facility, may fill the NACH/ECS/NECS/RECS/AUTO DEBIT form and submit duly signed with their name mentioned.
- Mobile Number and Email Id: Unit holder(s) should mandatorily provide their mobile number and email id on the mandate form. Where the mobile number and email id mentioned on the mandate form differs from the ones as already existing in the folio, the details provided on the mandate will be updated in the folio. All future communication whatsoever would be, thereafter, sent to the updated mobile number and email id.
- Unit holder(s) need to provide along with the mandate form an original cancelled cheque (or a copy) with name and account number pre-printed of the bank account to be registered or bank account verification letter for registration of the mandate failing which registration may not be accepted. The Unit holder(s) cheque/ bank account details are subject to third party verification.
- Investors are deemed to have read and understood the terms and conditions of NACH/ECS/NECS/RECS/AUTO DEBIT Facility, SIP registration through NACH/ ECS/ NECS/ RECS/AUTO DEBIT facility, the Scheme Information Document, Statement of Additional Information, Key Information Memorandum, Instructions and Addenda issued from time to time of the respective Scheme(s) of Birla Sun Life Mutual Fund.

Acknowledgement		ISC Stamp
Investor Name: _____	Folio No/Application No. _____	
<input type="checkbox"/> DEBIT MANDATE FORM <input type="checkbox"/> SIP FORM		

Website : www.birlasunlife.com | E-mail : connect@birlasunlife.com | Contact Centre : 1-800-270-7000/ 1-800-22-7000

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) **SYSTEMATIC INVESTMENT THROUGH NACH/ NECS / DIRECT DEBIT / PDC FACILITY APPLICATION FORM**

Scheme Name _____ Plan _____ Option _____

Sweep To:- Scheme Name _____ Plan _____ Option _____

Amount (₹) _____

- Request for**
- Renewal of SIP
- Registration of SIP
- Registration of CSIP
- Change in Bank Details
- Additional Micro SIP in same folio

CHECKLIST

Particulars	Regular SIP	Century SIP (with Life Insurance)	Micro SIP (Upto ₹ 50,000 Investment in a year)
Nomination	Not Required	Mandatory Requirement	Not Required
First Purchase through cheque/ DD	Recommended	Mandatory Requirement	Recommended
Different amount for first cheque and subsequent installment	Allowed	Not allowed	Allowed
Common Application Form	Required only for new Investors	Mandatory Requirement for All Investors	Required only for new Investors
Investment tenure	Investor's choice / Default	Tenure = 55years (Less) Current age	Investor's choice / Default
PAN and KYC	Mandatory Requirement	Mandatory Requirement	If having a PAN, KYC is mandatory
Dates	Max upto 4 dates in a month	Only 1 date per month	Max upto 4 dates in a month
Minimum Amount Criteria (For list of eligible schemes please refer the SIP and CSIP instructions.)	Birla Sun Life Tax Relief '96 and Birla Sun life Tax Plan - ₹ 500 / each, Other eligible Schemes- ₹ 1000/ each.	₹ 1000 per month for all eligible schemes	Birla Sun Life Tax Relief '96 and Birla Sun life Tax Plan - ₹ 500 / each, Other eligible Schemes- ₹ 1000/ each.
Application with Minor as first applicant	Allowed	Not allowed	Allowed

We request you to read Terms and Conditions before availing Century SIP

[A. LIST OF CITIES THROUGH NACH/ ECS/ NECS/ RECS]**

(PAYMENT THROUGH NACH/ ECS/ NECS/ RECS CLEARING SERVICE OF THE RESERVE BANK OF INDIA)

Delhi, Ludhiana, Amritsar, Jalandhar, Chandigarh, Shimla, Jammu, Raichur, Bikaner, Gangtok, Darjeeling, Anand, Bhavnagar, Kota, Kanpur, Allahabad, Varansi, Lucknow, Dehradun, Gorakhpur, Agra, Jaipur, Bhillwara, Udaipur, Jodhpur, Rajkot, Jamnagar, Ahmedabad, Baroda, Surat, Mumbai, Goa, Pune, Sholapur, Kolhapur, Nasik, Aurangabad, Nagpur, Indore, Bhopal, Gwalior, Jabalpur, Raipur, Hyderabad, Tirupati, Vijaywada, Nellore, Vizag, Kakina, Bangalore, Mysore, Mangalore, Udupi, Hubli, Gadag, Bijapur, Belgaum, Davangere, Shimoga, Tumkur, Mandya, Gulbarga, Chennai, Pondicherry, Trichy, Madurai, Salem, Erode, Thirupur, Calicut, Trichur, Cochin, Trivandrum, Coimbatore, Kolkata, Bardhaman, Durgapur, Siliguri, Bhubaneswar, Guwahati, Patna, Dhanbad, Jamshedpur, Ranchi, Haldia, Asansol, Cuttack

** (subject to revisions in dates and locations offered)

[B. LIST OF BANKS FOR PAYMENT THROUGH AUTO DEBIT]**

Punjab National Bank (All branches under core banking), Bank of Baroda (All branches under core banking), Union Bank of India (All branches under core banking), Bank of India (All branches under core banking), IDBI (All Branches), HDFC (All Branches), Axis Bank (All Branches), IndusInd Bank (All Branches), Oriental bank of commerce (all branches) and Corporation Bank (all branches) ICICI Bank (All Branches), Kotak Bank (All Branches), State Bank of India (All Branches), Dhanlaxmi Bank (All Branches), Federal Bank (All Branches) and UCO Bank (All Branches)

** (subject to revisions in dates and locations offered)

C. PDC LOCATIONS

Investors are requested to contact the Birla Sun Life Mutual Fund Branches / Call Centers or Please refer www.birlasunlife.com

D. SCHEMES AVAILABLE UNDER SIP

Birla Sun Life Advantage Fund / Birla Sun Life Dividend Yield Plus / Birla Sun Life Tax Plan* / Birla Sun Life India Opportunities Fund / Birla Sun Life MNC Fund / Birla Sun Life Midcap Fund / Birla Sun Life India GenNext Fund / Birla Sun Life Equity Fund / Birla Sun Life New Millennium Fund / Birla Sun Life Buy India Fund / Birla Sun Life Frontline Equity Fund / Birla Sun Life Tax Relief '96* / Birla Sun Life Commodity Equities Fund - Global Agri Plan / Birla Sun Life '95 Fund / Birla Sun Life Top 100 Fund / Birla Sun Life Infrastructure Fund / Birla Sun Life India Reforms Fund / Birla Sun Life Small & Midcap Fund / Birla Sun Life International Equity Fund / Birla Sun Life Index Fund / Birla Sun Life Special Situations Fund / Birla Sun Life Pure Value Fund / Birla Sun Life Asset Allocation Fund / Birla Sun Life Savings Fund / Birla Sun Life Short Term Opportunities Fund / Birla Sun Life Dynamic Bond Fund / Birla Sun Life Floating Rate Fund - Long Term Plan / Birla Sun Life Gift Plus / Birla Sun Life Income Plus / Birla Sun Life Government Securities Fund / Birla Sun Life MIP # / Birla Sun Life MIP II # / Birla Sun Life Monthly Income # / Birla Sun Life Treasury Optimizer Plan / Birla Sun Life Short Term Fund / Birla Sun Life Medium Term Plan / Birla Sun Life Enhanced Arbitrage Fund / Birla Sun Life Gold Fund / Birla Sun Life Long Term Advantage Fund / Birla Sun Life Banking and Financial Services Fund / Birla Sun Life Manufacturing Equity Fund / Birla Sun Life Equity Savings Fund / Birla Sun Life Corporate Bond Fund.

E. GENERAL INSTRUCTIONS FOR SIP

General Instructions

- New investors who wish to enroll for SIP should fill this form in addition to the Common Application Form. Please quote the application number of the Common Application Form on this SIP Form. Details of the SIP should be provided on this form. Both Forms should be submitted together. Single scheme is allowed per application. For multiple transactions, please fill separate forms with first purchase cheque.
- Existing investors needs to fill up only this form and first purchase cheque with existing folio details. The AMC reserves the right to assign any of the existing Folio Number of the investor against multiple applications and / or subsequent purchases under this new application form lodged, with identical mode of holding and address and such other criteria and integrity checks as may be determined by the AMC from time to time.
Note: Investors can also start a SIP without any initial investment. New investors need to submit this application form along with Common Application Form, whereas existing investors can start SIP without initial investment by submitting this form along with existing folio details.
- NECS facility is offered to the investors having bank account in selected cities mentioned above.
- The cities in the list may be modified/updated/changed/removed at any time in future entirely at the discretion of Birla Sun Life Mutual Fund without assigning any reasons or prior notice if any city is removed, SIP instruction for investors in such cities via NECS (Debit) route will be discontinued without prior notice.
- The name of the bank provided for NECS (Debit) should participate in local MICR clearing.
- The investor hereby agrees to abide by the terms and conditions of NECS facility of Reserve Bank of India (RBI).
- SIP Form should be submitted 21 days before the first Debit through NACH/ECS/NECS/RECS/ Auto Debit.

Mandatory Details

- In case the application is accompanied with a cheque for the first SIP transaction, it should be drawn on the same bank account which is to be registered for NACH/ECS/NECS/RECS/ Auto Debit.
 - Investor should provide 9 digit MICR code for NECS transaction and complete bank address for SIP auto debit transactions. MICR starting with 000 and end with 000 will not be acceptable for NECS transactions.
- Default Details**
- Default Dates: In case of any ambiguity in selection of investment frequency, the SIP date will be 7 of each month. In case where more than 4 dates are specified, default dates will be 7, 15, 20 & 28 of each month
 - For Regular SIP - "Default end date is December 31, 2099. In case the 'End Date' is not mentioned by the investor in the Form, the same would be considered as 31st December, 2099 by default". For CSIP - refer instruction F5.
 - Minimum Amount :
 - For Monthly SIP: (i) Birla Sun Life Tax Plan and Birla Sun Life Tax Relief '96: Minimum 6 cheques/ Installments of ₹ 500/- each and above.
 - Other Schemes: Minimum 6 Cheques/ Installments of ₹ 1,000/- each and above.
 - All post-dated cheques have to be issued favouring the individual scheme.
 - The initial/ first SIP investment amount can be different from the subsequent SIP amount provided the initial/ first SIP investment amount also confirms to the minimum SIP amount criteria of the respective scheme.
 - Investment Dates: Monthly Systematic Investment Plan: Cheques should be of the following dates: 1st and/or 7th and/or 10th and/or 15th and/or 20th and/or 28th of every month.
 - Fast Forward Facility: Investors can opt for multiple dates within a month in case of monthly SIP. Investors may choose maximum upto 4 dates from the following dates: 1st and/or 7th and/or 10th and/or 15th and/or 20th and/or 28th of every month.
 - Cheques should be drawn payable at locations of Birla Sun Life Asset Management Company Limited branches & authorised centres. Non MICR/ outstation post dated cheques will not be accepted for SIP.
 - Allotment of Units
Units will be Allotted at the NAV related prices of the 1st and/or 7th and/or 10th and/or 15th and/or 20th and/or 28th of every month (or next business day, if 1st and/or 7th and/or 10th and/or 15th and/or 20th and/or 28th is a non business day). An account statement will be dispatched to the unit holders once every quarter within 10 working days of the end of each quarter. The first account statement will be issued within 10 working days of the initial investment. Further an updated account statement will be sent after each transaction under the special products wherever, e-mail address has been provided, the account statement will be sent through e-mail only.

Change of Amount

Investors can change the SIP amount by submitting the following documents 21 days before the next NECS debit date :

- A new 'SIP through NECS Facility' Form with revised SIP amount details.
- Letter to discontinue the existing SIP

Change of Bank

In order to change the existing bank account for NECS/SIP Auto Debit investors need to submit following documents 21 calendar days before the next SIP debit

- A new 'SIP through NECS Facility' Form with Change of bank details and cancelled cheque of new bank.
- Letter to discontinue the existing SIP

Discontinue/ Cancellation of SIP

The investor has the right to discontinue SIP at any time he/she so desires by sending a written request 21 calendar days in advance of the immediate next due date to any of the offices of Birla Sun Life Mutual Fund or their Authorized Collection Centres. On receipt of such request SIP will be terminated.

Conversion of PDC facility in to NECS/ Auto debit Facility

Investor with existing SIP facility through Post Dated Cheques can also avail of this facility by submitting the following documents 21 days before the next NECS Debit date :

- SIP through NECS Facility Form along with one cancelled cheque.
- Letter requesting to cancel the existing SIP through PDCs and for returning all the remaining PDCs.

MICRO SIP :-

- As per AMFI notification and Guidelines issued on July 14, 2009, SIPs or lumpsum by eligible investors where aggregate (under all schemes of Mutual Fund) in a rolling 12 month period or in a financial year i.e. April to March does not exceed ₹ 50,000 (known as 'Micro SIP') shall be exempted from the requirement of PAN.
- This exemption of PAN requirement is only available to individuals (including Joint Holders, NRIs but not PIOs),

Minors and Sole proprietary firms who do not possess PAN*. HUFs and other categories will not be eligible for this exemption.

* In case of joint holders, first holder must not possess a PAN.

- Please note that for availing Micro SIP investor have to submit KYC/ KRA acknowledgement/confirmation quoting PAN Exempt KYC Reference No. (PEKRN) obtained from KYC Registration Agency (KRA) along with the application form for such investments. Eligible investors must hold only one PEKRN.
- Please note that investors holding a valid permanent Account Number (PAN) issued by Income tax Department are mandatorily required to be KYC compliant and submit the KYC/KRA acknowledgement/confirmation.
- Additional Micro SIP in same folio: For Subsequent Micro SIP applications, investor can quote the existing folio number where a Micro SIP has been registered and need not resubmit the supporting document.
- In case of any deficiencies in the supporting documents or in case of the aggregate of SIP investments exceeding Micro SIP threshold, the Mutual Fund reserves the right to reject the applications.
- In case the first Micro SIP installment is processed, and the application is found to be defective, the Micro SIP registration will be ceased for future installments. No refund shall be made for the units already allotted and the investors may redeem their investments.
- "On behalf of Minor" Accounts: Name of Guardian must be mentioned if investments are being made on behalf of a minor. Date of birth is mandatory in case of minor. The minor shall be the first and the sole holder in the account (folio). No joint holder will be allowed in an account (folio) where minor is the first or sole holder. Guardian in the account (folio) on behalf of the minor should either be a natural guardian (i.e. father or mother) or a court appointed legal guardian and the same must be mentioned in the space provided in application form. Copy of document evidencing the date of birth of the minor and relationship of the guardian with the minor (whether natural or legal guardian) should mandatorily be provided while opening of the account (folio). Also, nomination shall not be allowed in a folio account held on behalf of a minor.

STEP-UP SIP

- Frequency for Step-Up SIP:**
 - Half Yearly Step-Up SIP:** Under this option, the amount of investment through SIP installment shall be increased by amount chosen/designated by Investor post every 6th (sixth) SIP installment.
 - Yearly Step-Up SIP:** Under this option, the amount of investment through SIP installment shall be increased by amount chosen/designated by Investor post every 12th (twelfth) SIP installment.
- Minimum Step-Up SIP Amount:** ₹ 500 and in multiples of ₹ 500 thereafter.
- Default Step-Up SIP Frequency and amount:** In case the investor fails to specify any frequency or amount for Step-Up SIP the same shall be deemed as Yearly Step-Up SIP and ₹ 500 respectively and the application form shall be processed accordingly. In case the investor fails to specify both, i.e. the frequency for Step-Up SIP and amount for Step-Up SIP, the application form may be processed as conventional SIP, subject to it being complete in all other aspects.
- Step-Up SIP shall also be available to investors availing Birla Sun Life Century SIP (Century SIP) under designated schemes, subject to eligible insurance cover calculated on the basis of amount of First (1st) installment under Century SIP.
- Maximum Tenure for Step-Up SIP:** 10 years. (i.e. Investors may chose / have tenure of more than 10 years under SIP / Century SIP; however, in such cases, feature of Step-Up SIP shall be considered and processed for a maximum of 10 years only.)
- Step-Up SIP shall be available for SIP / Century SIP Investments through NECS Facility only.** Step-Up SIP shall not be available under Fast Forward SIP facility.
- Century SIP offered by AMC/Mutual Fund shall be available for unitholders in case the units are held/opted to be held in physical (non-demat) mode only.
- DEMAT ACCOUNT DETAILS:** Option to hold Units in dematerialized (demat) form
 - Units will be allotted based on the applicable NAV as per the SID and will be credited to investors Demat account on weekly basis upon realization of funds. For e.g. Units will be credited to investors Demat account every Monday for realization status received in last week from Monday to Friday.
 - SIP insurance related products; unit allotment will not be done in Demat account.
 - Pursuant to SEBI Circular no. CIR/IMD/DF/9/2011 dated May 19, 2011, effective October 01, 2011, Investors have an option to subscribe to/hold units of Scheme(s)/Plan(s) in open ended, close ended, Interval (except for exchange traded fund(s) in dematerialized (demat) form. Consequently, the Unitholders under the Scheme(s)/Plan(s) shall have an option to subscribe to/ hold the units in electronic (demat) form in accordance with the provisions laid under the respective Scheme(s)/Plan(s) and in terms of the guidelines/procedural requirements as laid by the Depositories (NSDL/CDSL) from time to time. Units under Plan(s)/Option(s) of all Schemes of Birla Sun Life Mutual Fund with dividend distribution of daily, weekly or fortnightly frequency, as defined under respective Scheme Information Document, shall be available in physical (non-demat) mode only. Also, various Special Products/Facilities such as Century SIP Systematic Withdrawal Plan, Systematic Transfer Plan, Switching etc. offered by AMC/Mutual Fund shall be available for unitholders in case the units are held/opted to be held in physical (non-demat) mode. Investors intending to hold units in electronic (demat) form will be required to have beneficiary account with a Depository Participant (DP) (registered with NSDL / CDSL) and will be required to indicate, in the application form, the DP's name, DP ID Number and the Beneficiary account number of the applicant held with the DP at the time of subscribing to the units. Applicants must ensure that the sequence of the names as mentioned in the application form matches with that of the beneficiary account held with the DP Names, PAN details, KYC details etc. mentioned in the Application Form will be verified against the Depository records. If the details mentioned in the application form are found to be incomplete / incorrect or not matching with the depository records, the application shall be treated as application for physical (non-demat) mode and accordingly units will be allotted in physical (non-demat) mode, subject to it being complete in all other aspects. Unitholders who have opted to hold and thereby allotted units in electronic (demat) form will receive payment of redemption / dividend proceeds into bank account linked to their Demat account. Units held in electronic (demat) form will be transferable subject to the provisions laid under the respective Scheme(s)/Plan(s) and in accordance with provisions of Depositories Act, 1996 and the Securities and Exchange Board of India (Depositories and Participants) Regulations, 1996 as may be amended from time to time. In case, the Unitholder desires to hold the Units in a Dematerialized / Rematerialized form at a later date, the request for conversion of units held in physical (non-demat) mode into electronic (demat) form or vice-versa should be submitted alongwith a Demat/Remat Request Form to their Depository Participant(s). Investors should ensure that the combination of names in the account statement is the same as that in the demat account.

In case 3 (three) consecutive installments are not honoured / failed on account of reasons attributable to the investors like insufficient balance etc. Birla Sun Life Asset Management Company Limited shall discontinue SIP, SWP and STP registrations