

# SPECIAL PRODUCTS APPLICATION FORM

(SIP-PDC / SWP / STP / DAP)



**Birla Sun Life**  
Mutual Fund

Investment Advisor's Name &amp; ARN

Sub-Broker's Name &amp; ARN

Stamp &amp; Sign

Official Acceptance Point

Ref. Instruction No. B-7

Application / Folio No.

Date

## 1. APPLICANT INFORMATION (MANDATORY)

### 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.

### NAME OF THE GUARDIAN (in case of First / Sole Applicant is a Minor) / CONTACT PERSON – DESIGNATION (in case of non-individual Investors)

Mr. Ms. M/s.

E-mail ID

please provide your email ID  
for mailing of Account Statement

\*Ref. Instruction No. B-6

PAN\* (Mandatory for investors)

KYC  
Complied

PAN\* (Mandatory for investors)

KYC  
Complied

PAN\* (Mandatory for investors)

KYC  
Complied

PAN\* (Mandatory for investors)

KYC  
Complied

## 2. SYSTEMATIC INVESTMENT PLAN (SIP) - POST DATED CHEQUES (PDC)

SCHEME	PLAN	OPTION
<b>SWEEP TO</b> (Ref. Instruction C-8)	SCHEME	PLAN / OPTION
Investment Amount (Rs.) (in figures)	Investment Period (in months) From	To
Investment Commencement Date	Dates (Only one date)	
Drawn on Bank	Branch	
Cheque Dates From	To	Cheque Nos. From To
Account Type <input checked="" type="checkbox"/> SAVINGS <input type="checkbox"/> CURRENT <input type="checkbox"/> OTHERS	Frequency <input checked="" type="checkbox"/> MONTHLY (max 4 SIP dates in a months) <input type="checkbox"/> QUARTERLY (Only one date)	

## 3. SYSTEMATIC WITHDRAWAL PLAN (SWP)

SCHEME	PLAN	OPTION
Withdrawal Option <input checked="" type="checkbox"/> FIXED or <input type="checkbox"/> APPRECIATION WITHDRAWAL (Only on the 1st of every month)	Amount (Rs.) (in figures)	
Total Amount of SWP (Rs.) (in figures)	Fixed Withdrawal Frequency <input checked="" type="checkbox"/> MONTHLY (minimum 8 months) or <input type="checkbox"/> QUARTERLY (minimum 4 quarters)	
Dates (Only one date)	Withdrawal Period From	To

## 4. SYSTEMATIC TRANSFER PLAN (STP) / DISCIPLINE ADVANTAGE PLAN (DAP)

<input checked="" type="checkbox"/> SYSTEMATIC TRANSFER PLAN (STP)	<input type="checkbox"/> DISCIPLINE ADVANTAGE PLAN (Refer Instruction No. F)	
<b>FROM SCHEME</b>	<b>PLAN</b>	<b>OPTION</b>
<b>TO SCHEME</b>	<b>PLAN</b>	<b>OPTION</b>
Amount per Transfer (Rs.)	Transfer Period From	To
Dates (Only one date)	Frequency <input checked="" type="checkbox"/> WEEKLY <input type="checkbox"/> MONTHLY* (max 4 STP dates in a months) <input type="checkbox"/> QUARTERLY (Only one date)	
Total Amount of Transfer (Rs.)	No. of Transfers	*only one date for DAP

## 5. DECLARATION AND SIGNATURES

Having read and understood the contents of the Statement of Additional Information / Scheme Information Document of the scheme(s), I/We hereby apply to the Trustee of Birla Sun Life Mutual Fund for units of scheme(s) of Birla Sun Life Mutual Fund as indicated above and agree to abide by the terms, conditions, rules and regulations of the scheme(s). I/We hereby declare that the particulars given herein are correct and complete. I/We confirm that I/we have not received and will not receive any commission or brokerage or any other incentive in any form, directly or indirectly, for subscribing to units issued under any of the scheme(s). I/We hereby declare that the amount invested in the scheme(s) is through legitimate sources only and does not involve 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, 1961, Prevention of Money Laundering Act, 2002, Prevention of Corruption Act, 1988 or any other applicable laws enacted by the Government of India from time to time.

**For NRIs/Flis 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 Account/FCNR account/NRO/NRSR Account.

Signature(s)

Sole / First Applicant

Second Applicant

Third Applicant

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

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor)

SPECIAL PRODUCTS 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 Tel. 43568000,

Toll Free : 1800-270-7000 | sms 'GAIN' to 56161 | Email: connect@birlasunlife.com

Application No.

Collection Centre /  
AMC Stamp & Signature

Received from Mr. / Ms. \_\_\_\_\_ Date : \_\_\_\_/\_\_\_\_/\_\_\_\_