

# MF Utilities India Pvt. Ltd.

103-105, Orion Business Park, Ghodbunder Road, Kapurbawdi Thane (West) - 400 607 CIN: U74120MH2013PTC242939

ARN Code	
EUIN Code	

# **COMMON ACCOUNT NUMBER (CAN) Registration Form - INDIVIDUAL**

Please read all the instructions carefully before filling the form
Please fill in ENGLISH and in BLOCK LETTERS with black ink
Fields marked with (\*) are mandatory and if not filled, the form is liable for rejection

<b>n -</b> l	INDIVIDUAL	

Solid Primary Applicant Details:	ields marked with (*) are	manda	atory	and i	f no	t fille	ed, the	fo	rm is	liab	le	for r	reje	ction	l											num	ber he	re	_	_	_
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**Part   **P	* Mode of Holding please tick (<)		Sing	le	╝	Any	one or S	Surv	ivor		J	oint			* Inv	esto	r Cate	gory		Indiv	idual			Min	or		5	Sole-	Propr	ieto	r
**PAN	* Residential Status please tick (	)	RES.I	ND		NRI-N	NRE		NRI-N	RO		FC	OREI	GN NA	TION	IAL		Р	10												
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Office Telephone No.  ISD Code  STD Code  Telephone Number  Fax No.  ISD Code  STD Code  Fax Number  * Email ID  * Email ID  **  * Email ID  **  **  **  **  **  **  **  **  **	. * Contact details of the	sole/p	rimary	/ app	olica	nt:																									
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	eceived from Mr. / Ms.																								PO	INT OF S	ERVIC	E STAN	VIP & SI	SNATU	JRE
					(CAN	I).																_									

D. Depository Account Details: ("Optional" - To be filled by investors who wish to hold their units in Depository Account - refer instructions) **National Securities Depository Limited (NSDL)** Central Depository Services Limited (CDSL) Depository Participant Name' Attach latest copy of the 먑 ı Ν E. \* Bank Account Details: (Atleast one bank account should be mandatorily registered under CAN. Fields marked mandatory for the default account will be mandatory for additional accounts, if provided) a. Default and Primary Bank Mandate for Payout (1) \* A/c No. \* A/c Savings Cash Credit O/D Others Туре \*IFSC please (✓) NRE NRO \*MICR FCNR NRSR **Bank Name Branch Name** City \* Proof of Account (refer instructions) Cancelled Cheque or Copy Bank Passbook Bank Statement Letter from Bank confirming the Account Payout proceeds will be processed into the bank through ELECTRONIC payment, basis arrangement of the respective ve Mutual Fund with its banker. If you wish to receive a physical payment please tick (🗸) b. Additional Bank Mandate for Payout (2) A/c Savings O/D Cash Credit Others A/c No. Current Туре MICR IFSC please (√) NRE NRO FCNR NRSR **Bank Name Branch Name** City Proof of Account (refer instructions) Cancelled Cheque or Copy Bank Passbook Bank Statement Letter from Bank confirming the Account Payout proceeds will be processed into the bank through ELECTRONIC payment, basis arrangement of the respective Mutual Fund with its banker. If you wish to receive a physical payment please tick (🗸) c. Additional Bank Mandate for Payout (3) A/c Savings Current Cash Credit O/D Others A/c No. Туре IFSC please (√) NRE MICR NRO FCNR NRSR **Bank Name** City **Branch Name** Proof of Account (refer instructions) Cancelled Cheque or Copy Bank Passbook Bank Statement Letter from Bank confirming the Account Payout proceeds will be processed into the bank through ELECTRONIC payment, basis arrangement of the respective Mutual Fund with its banker. If you wish to receive a physical payment please tick (\*) d. Additional Bank Mandate for Payout (4) A/c No. A/c Savings Current Cash Credit O/D Others Type IFSC please (√) NRE MICR NRO FCNR NRSR **Bank Name Branch Name** City Proof of Account (refer instructions) Letter from Bank confirming the Account Cancelled Cheque or Copy Bank Passbook Bank Statement Payout proceeds will be processed into the bank through ELECTRONIC payment, basis arrangement of the respective Mutual Fund with its banker. If you wish to receive a physical payment please tick (1) Additional Bank Mandate for Payout (5) A/c No. A/c Savings Current Cash Credit O/D Others Type please (✓) NRE MICR NRO FCNR NRSR **Bank Name Branch Name** City Proof of Account (refer instructions) Cancelled Cheque or Copy Letter from Bank confirming the Account Bank Passbook Payout proceeds will be processed into the bank through ELECTRONIC payment, basis arrangement of the respective Mutual Fund with its banker. If you wish to receive a physical payment please tick (1) 8 Benefits of MF Utility Account Number (CAN) Single reference number for all investments in the Mutual Fund Industry O Transaction Form (CTF) Single form for transactions in multiple schemes across Mutual Funds м Payment Consolidated payment for investments in multiple schemes across Mutual Funds using a single CTF М **KYC Process** Single KYC verification/registration at the time of CAN creation Mandate Registration (CMR) Single Mandate registered for multiple SIP Registrations using a single CTF Ν

Single place for registering and tracking complaints for the Mutual Industry

**Complaints System** 

'We wish to nominate as under, please tick (✓)				I/We DO NOT WISH	to nominate, please tick (✓)
Name(s) and address(es) of Nominee(s)	Nominee [ [ Relationship	Oate of Birth	Name and address of Guardian thed in case nominee is minor)	Signature of Nominee/ Guardian of Nominee	Proportion % in which the units shall shared by each nominee (Total 100%
			ned in case nonlinee is illinor,	Guaranan or roommee	Sharea by each hommer (rotal 200)
Nominee 1	D	D/MMM/YYYY			%
Nominee 2	D	D/MMM/YYYY			
Nominee 3	D	D/MMM/YYYY			%
Other Details:					
Sole/Primary Applicant (or) Guardian (if s      Grass Applicant (or) Guardian (if s)		Below 1 Lac		- 10 Lac 10 - 25	Lac > 25 Lacs
<ol> <li>Gross Annual Income Details please tick</li> <li>(OR)</li> </ol>	( ( v )	Below 1 Lac	1 - 3 Lac	- 10 Lac 10 - 23	ZZ Lacs
Net-worth in ₹. (* Net worth shoul	d not be older tha	n 1 year)	as on (date) D D / M N	им/ у у у	
2. Occupation (please tick (✓) any one and g	give brief details):				
Private Sector Service Pub	olic Sector	Government	Service Business	Professional	riculturist
Housewife Student Fo	orex Dealer	Others (ple	ease specify)	specify here	
3. Please tick, if applicable: Politic	ally Exposed Perso	in F	elated to a Politically Exposed Persor	(For definition of PE	P, please refer instructions overleaf)
4. Any other information:					
Second Applicant:					
1. Gross Annual Income Details please tick	<(√)	Below 1 Lac	1 - 5 Lac 5	- 10 Lac 10 - 25	Lac > 25 Lacs
(OR)					
Net-worth in ₹. (* Net worth shoul		n 1 year)	as on (date)	A M / Y Y Y Y	
2. Occupation (please tick (✓) any one and g		Government	Samiles Business	Dustanianal	Detical Detical
	olic Sector				riculturist Retired
Housewife Student Fo	orex Dealer	Others (ple	ease specify)	specify here	
3. Please tick, if applicable: Politic					
	ally Exposed Perso	in F	elated to a Politically Exposed Persor	(For definition of PE	P, please refer instructions overleaf)
4. Any other information:	ally Exposed Perso	in F	elated to a Politically Exposed Persor	(For definition of PE	P, please refer instructions overleaf)
	ally Exposed Perso	n F			
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick		Below 1 Lac		(For definition of PE	
Any other information:     Third Applicant:	<( <b>∀</b> )	Below 1 Lac	1 - 5 Lac 5		
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)	< (✓) d not be older tha	Below 1 Lac	1 - 5 Lac 5	- 10 Lac 10 - 25	
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and g	< (✓) d not be older tha	Below 1 Lac	as on (date) DD/MM	- 10 Lac 10 - 25	
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and go Private Sector Service Pub	d not be older tha	Below 1 Lac n 1 year) Government	as on (date) D / M N  Service Business	- 10 Lac	Lac > 25 Lacs
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and go private Sector Service Pub.  Housewife Student For	d not be older tha give brief details): olic Sector orex Dealer	Below 1 Lac n 1 year)  Government  Others (ple	as on (date) D D / M N  Service Business  ease specify)	- 10 Lac 10 - 25  // M / Y Y Y Y  Professional Ag  specify here	Lac >25 Lacs riculturist Retired
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and Berrivate Sector Service Publication (Please tick, if applicable: Politication (Please tick, if applicable)	d not be older tha	Below 1 Lac n 1 year)  Government  Others (ple	as on (date) D / M N  Service Business	- 10 Lac 10 - 25  // M / Y Y Y Y  Professional Ag  specify here	Lac > 25 Lacs
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and go private Sector Service Pub	d not be older tha give brief details): olic Sector orex Dealer	Below 1 Lac n 1 year)  Government  Others (ple	as on (date) D D / M N  Service Business  ease specify)	- 10 Lac 10 - 25  // M / Y Y Y Y  Professional Ag  specify here	Lac > 25 Lacs riculturist Retired
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and government of the private Sector Service Publication of the priva	d not be older tha give brief details): olic Sector orex Dealer	Below 1 Lac n 1 year)  Government Others (ple	as on (date) DD / MN  Service Business ease specify)  Related to a Politically Exposed Persor	- 10 Lac	riculturist Retired  P, please refer instructions overleaf)
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4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and a private Sector Service Publicate Student For all Mutual Politicate Any other information:  Reference Number for all Mutual	d not be older tha give brief details): slic Sector orex Dealer ally Exposed Perso	Government Others (ple	as on (date)  Business  Business  Business  Business  Business  Business  Con Account Number (CA)  d to remember / maintain for the fill separate Account Oped to submit change requests	- 10 Lac	riculturist Retired  P, please refer instructions overleaf)
4. Any other information:  Third Applicant:  1. Gross Annual Income Details please tick (OR)  Net-worth in ₹. (* Net worth shoul)  2. Occupation (please tick (✓) any one and private Sector Service Publication (Please tick, if applicable:  4. Any other information:  Reference Number for all Mutual Investments  Account Opening Process	d not be older tha give brief details): slic Sector orex Dealer ally Exposed Perso	Government Others (plant)  Comm No nee No nee informa	as on (date)  Business  Business  Business  Business  Business  Business  Con Account Number (CA)  d to remember / maintain for the fill separate Account Oped to submit change requests	Professional Ag specify here  (For definition of PE  N)  lios at Mutual Fund ening forms for each Mutual Fund to a	riculturist Retired  P, please refer instructions overleaf)

* Details required under Foreign Tax Laws (Mandatory please refer instructions):											
	Is your Country of Birt	th / Citizenship / Nationality / Tax Residency other than Inc	lia? Please tick as applicable and provide the be	low mentioned information (mandatory)							
Applicant Details		If YES, please indicate all countries in wh	If YES, please indicate all countries in which you are resident for tax purposes and the associated Tax Reference Numbers below:								
Applicant Details	If NO, please tick (✔) below	Country of Birth (COB), Country of Citizenship (COC), Country of Nationality (CON)	Country of Tax Residency #	Tax Reference Number							
	I am a tax resident of India and not resident of any other	COB:	1.	1.							
Sole / Primary Applicant	country	coc:	2.	2.							
		CON:	3.	3.							
Constitution	I am a tax resident of India and not resident of any other	COB:	1.	1.							
Guardian (in case of Minor Applicant) (OR) Power of Attorney	country	coc:	2.	2.							
,		CON:	3.	3.							
	I am a tax resident of India and not resident of any other	COB:	1.	1.							
Second Applicant	country	coc:	2.	2.							
		CON:	3.	3.							
	I am a tax resident of India and not resident of any other	COB:	1.	1.							
Third Applicant	country	coc:	2.	2.							
		CON:	3.	3.							
# Please indicate all co	ountries in which you are a re	sident for tax purpose and mention the associated Tax Refe	erence Number. Include USA, where investor is a	citizen/ greencard holder of USA							
Authorization on Single Payment for Multiple Scheme Investments through a Single Transaction Form:  I / We understand and agree that MF Utilities India Private Limited ("MFUI") shall facilitate the investments in multiple schemes across Mutual Funds made by me / us through MF Utility by way of a single payment made by me / us. To enable MFUI accept the transaction with payment and transmit the investment amount. I / we authorise MFUI to do the following acts, deeds and things for and on my / our behalf:											

- the investment amount, I / we authorise MFUI to do the following acts, deeds and things for and on my / our behalf:

  1. To accept single payment made by me / us either physically /electronically favouring the account created for this purpose and managed by MFUI, towards the investments made by me / us in multiple schemes across Mutual Funds through MF Utility.

Sole/First Applicant/Guardian	Second Applicant	Sign Here  Third Applicant				
	Signification	Sign Here				
Sign Here	Sign Here	g: 11				
I/We hereby authorise MFU sharing of the information provided by me/us on this form with its Authorised Representatives/Entities.  I/We have provided all the necessary documents/annexures, wherever asked for, to substantiate the information provided by me/us in the form and agree to provide any further information if required, for the purpose of this Registration.  I/We hereby authorize MFU to map with this CAN, our existing folios with the Mutual Funds or folios, in case created in future.						
	or untrue or misrepresenting, I/We am/are aware the					
	change in the above details and information given	by me/us.				
I/We hereby acknowledge that I/We have read, un I/We hereby declare that the details furnished here	derstood and agree to the terms and conditions and conditions and complete, true and correct.	nexed to this Registration form.				
	lace :					
through Distributor and; 3. To do all such acts, deeds and things as may be	necessary or incidental to the above mentioned pu	rpose.				

# Common Transaction Form (CTF)

Γ,	Form for multiple transactions	No need to fill and submit separate transaction forms for transactions in different schemes/Mutual
Ι,		Funds. Burden of handling multiple documents reduced
١,	Time-stamp for multiple transactions	One time-stamp applied uniformly for all transactions in the form. Burden of submitting transactions
"	N .	at different offices / locations reduced
١.	Payment Instrument for multiple	No need to issue separate payment instruments for different schemes/Mutual Funds. Burden of
Ľ	investments	handling multiple payment instruments reduced

# **TERMS AND CONDITIONS**

# A General Instructions:

- 1 The CAN Registration Form should be completed in ENGLISH and in BLOCK LETTERS only. Please tick in the appropriate box for relevant options wherever applicable. Do not overwrite.
- 2 A POA holder cannot request for a CAN Registration on behalf of the applicants.
- 3 Information marked (\*) are mandatory. For any correction / changes if made in the CAN Registration Form, the Applicant(s) shall enter the correct details pursuant to cancellation of incorrect details and authenticate the corrected details by counter-signing against the changes. Applications with any such changes not counter-signed by the applicants are liable for rejection.
- 4 Upon successful CAN creation, MFU will map with this CAN, the folios matching the CAN combination, which are already existing or created in future with the participating Mutual Funds or Mutual Funds that would participate in MFU in future. The information that is captured as default under the CAN shall be considered final and over-riding the existing default information prevailent in the folios that are mapped with the CAN.

## B KYC Compliance:

- 1 Compliance with KYC requirements is mandatory for all applicants. If you are already KYC compliant, please quote the PAN for all applicants and enclose a copy of the KYC Acknowledgement Letter issued by any SEBI registered KRA for each applicant. If not, please submit a KYC Registration form with necessary supporting documentary evidence along with the CAN Registration form. KYC Registration forms will be accepted only with CAN Registration.
- 2 The investors who are exempt from providing a PAN for their Mutual Fund investments, should quote their PAN Exempt KYC Reference No (PEKRN) obtained from KYC Registration Agency (KRA) and attach a copy of the KYC acknowledgement letter along with the CAN Registration form
- 3 On successful validation of the applicant/s PAN/PEKRN for KYC, the address available with the KRA will be obtained and all communications and payments shall be made by the MFU / Mutual Fund in the name of and favouring the first/sole applicant. If the Sole / Primary Applicant is a minor, the Guardian for the applicant needs to comply with the KYC requirements stated above. The address provided in the CAN Registration form will be used only for communications till the KYC status is verified at the KRA.

## C CAN criteria:

1 Applicants should specify the Mode of Holding (MoH), Investor Category and Residential Status (as per KYC) under which the application is made. Please note that this is the criteria defining the CAN combination and hence it is mandatory. In case of applications made in joint names without indicating the mode of holding, the default mode of holding will be 'Anyone or Survivor'.

## 2 Applicant Details:

The names of the applicant/s should be mentioned in full and the date of birth should be provided (as registered with the KRA). If there are any discrepancies between the information provided in the CAN and as available with the KRA, the application is liable for rejection.

# 3 Accounts of Minors (Below the age of 18 years):

- (a) A minor shall be the sole applicant in a CAN. Joint holding is not allowed. Applications by minors along with Joint applicants will be rejected.
  (b) Details of the natural parent viz., father or mother or court appointed legal Guardian must be mentioned for applications made on behalf of a minor.
- (c) Date of birth of the minor along with photocopy of supporting documents (i.e. Birth certificate, School leaving certificate / Mark sheet issued by Higher Secondary Board of respective states, ICSE, CBSE etc., Passport, or any other suitable proof evidencing the date of birth of the minor) duly attested should be provided while opening the CAN.
- (d) In case of a natural parent, documents evidencing the relationship of the natural parent with the minor, if the same is not available as part of the documents mentioned above should be submitted. In case of court appointed legal guardian, supporting documentary evidence should be provided.
- (e) The CAN(s) held on behalf of a minor applicant shall be frozen for operation by the natural parent/legal guardian on the day the minor attains majority and no transactions henceforth shall be permitted till requisite documents evidencing change of status from 'minor' applicant are received.

# D Details under Foreign Tax Laws:

- 1 Details under FATCA / Foreign Tax Laws: Tax Regulations require us to collect information about each investor's tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with relevant tax authorities. If you have any questions about your tax residency, please contact your tax advisor. Should there be any change in information provided, please ensure that you advise us promptly, i.e. within 30 days.
- 2 If you are a US citizen or resident or green card holder, please indicate United States in the "Country of Tax Residency" field along with your US Tax Identification Number. Foreign Account Tax Compliance provisions (commonly known as FATCA) are contained in the US Hire Act, 2010.

# E Contact Details:

1 Contact details like telephone, mobile and email address must be written in full. If the investor has provided an email address, the same will be registered in our records and will be treated as your consent to receive Allotment confirmations, consolidated account statement / account statement, annual report / abridged summary and any statutory / other information as permitted via electronic mode /email . Should the applicant experience any difficulty in accessing the electronically delivered documents, the applicant shall promptly intimate MFU / Mutual Fund about the same to enable MFU / Mutual Fund to make the delivery through alternate means. The MFU / AMC / Mutual Fund reserve the right to send any communication in electronic / physical mode.

# F Depository Account Details:

- 1 Investors have an option to hold the Units in their depository account subject to the facility being available under the respective scheme chosen for investment. Investors desiring to get the units credited in their depository account must have a beneficiary account with a Depository Participant (DP) of the Depositories i.e. National Securities Depositories Limited (NSDL) / Central Depository Services Limited (CDSL). If you wish to hold your investments in the depository account, you can choose to register the DP ID of your Depository Participant and your Beneficiary Account Number under the CAN. You can register ONE Depository account each per Depository i.e. NSDL and CDSL. Please attach a latest copy of the Client Master or the DP statement that you may have received from your Depository Participant as a documentary evidence. Names, mode of holding, PAN details, etc. of the Investor will be verified against the Depository data.
- 2 This provision in the CAN Registration Form is only for Registration of your Depository Account under the CAN with MFU. In case you wish to receive the credit of units into your depository account, you will have to specify the same every time you make a purchase of units.
- 3 Applicants must ensure that the sequence of names as mentioned in the application form matches with that of the account held with the Depository Participant. If the details mentioned in the application are incomplete / incorrect or not matched with the Depository data, the Depository Account registration under the CAN would be rejected. For units that are credited to the depository account, all details such as address, bank details, nomination etc. will be applicable as available in the respective depository account. For effecting any subsequent changes to such information, Investors should approach their DP.
- 4 Please note that this is an additional facility offered to unit holders who wish to hold units in the depository account. This is not a mandatory requirement and unit holders can continue holding units electronically with the Mutual Fund. For schemes where units are to be mandatorily held in the depository account, investors should provide atleast one depository account detail. Else the application is liable for rejection.

# **G** Bank Account Details:

- 1 An applicant at the time of CAN Registration must provide the details of the bank account (i.e. account into which redemption / dividend proceeds are to be paid) in the Application Form. The same is mandated to be provided under SEBI Regulations.
- 2 Please provide your complete bank account details including Account Number, Account Type, Bank, Branch & City. Please also specifically state the MICR Code (9 Digit Number next to your cheque number) and IFSC Code (11 character code printed on your cheque leaf) to facilitate electronic payment of your dividend payout entitlement / redemption proceeds.
- 3 The applicant is required to submit any one of following as a documentary proof alongwith the application form validating that bank account pertain to the sole / first Applicant.
  - (i) Original bank statement reflecting the First Holder Name, Bank Account Number and Bank Name as specified in the application OR Cancelled original cheque leaf of the bank account (where the account number and first applicant name is printed on the face of the cheque). Applicants should without fail cancel the cheque and write 'Cancelled' on the face of it to prevent any possible misuse;
  - (ii) Photocopy of the bank pass book or a statement of bank account with current entries not older than 3 months having the name and address of the first applicant and account number, duly attested by the bank manager with his / her full signature, name, employee code, bank seal and contact number;
  - (iii) A letter from the bank on its letterhead duly signed by the bank manager with his / her full signature, name, employee code, bank seal and contact number, certifying that the applicant maintains an account with the bank, the bank account information like bank account number, bank branch, account type, the MICR code of the branch & IFSC Code (where available).
- 4 Please note the above documents shall be submitted in Original. If copies are furnished, the same must be submitted along with the Original documents at Points of Service (POS) of MFU where they will be verified with the original documents to the satisfaction of MFU. The original documents will be returned across the counter to the applicant after due verification. In case the original of any document is not produced for verification, the copies should be attested by the bank manager with his / her full signature, name, employee code, bank seal and contact number.
- 5 In case the proof provided is different from the information provided, the Bank account will not be registered under the CAN. However, if minor discrepancies are found between the Bank Account Details furnished in the form vis-a-vis the proofs provided, MFU may at its discretion, update the bank details as appearing in the proofs provided.
- 6 Applications for CAN registration submitted without any of the above mentioned documents relating to bank account details will be treated as invalid and liable to be rejected.
- 7 Your dividend payout entitlement / redemption proceeds would be credited to your default and primary bank mandate electronically, as per the arrangement of respective Mutual Fund with the bank, subject to availability of complete bank account details (including core-banking account number and MICR/IFSC code of your bank / branch).
- 8 If you wish to receive payments by cheque instead of electronic payments, please tick the check-box provided for the purpose.

# 9 Multiple Bank Account Registration:

An applicant may register multiple bank accounts (up to 5 during CAN registration) for receiving redemption/ dividend proceeds etc. by providing necessary documents.

10 The bank details provided under Section D (a) in the CAN Registration form shall be considered as the default and primary bank account for the purpose of redemption / dividend payouts. In case the applicants wish to change the default account registered under the CAN at any point of time, they may do so by submitting a written request at an MFU Point of Service.

## 11 Indian Financial System Code (IFSC):

IFSC is a 11 digit number given by some of the banks on the cheques. IFSC will help to secure transfer of redemption and dividend payouts via the various electronic mode of transfers that are available with the banks.

#### **H** Nomination:

- 1 Investors should opt for the nomination facility to avoid hassles and inconveniences in case of unforeseen events in future. Through this facility the MFU / AMC is not in any way attempting to grant any rights other than those granted by law to the nominee(s). A nomination in respect of the Units does not create an interest in the property after the death of the Unit holder. The nominee(s) shall receive the Units only as an agent and trustee for the legal heirs or legatees of the deceased Unitholder as the case may be.
- 2 (a) Minor(s) can be nominated and in such cases, the name, address and signature of the natural parent/legal guardian representing such minor nominee(s) shall be provided by the Applicant.
  - (b) Nomination can also be made in favour of the Central Government, State Government, local authority, any person designated by virtue of his office or a religious or charitable trust.
  - (c) The Nominee shall not be a Trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of HUF or a PoA holder. Joint holder cannot be a nominee.
  - (d) A non-resident Indian can be a Nominee subject to the exchange control regulations in force, from time to time.
  - (e) The nomination can be made only by individuals applying for CAN on their own, singly or jointly. Holder of POA cannot nominate. Only unit holders can sign nomination registration/cancellation requests. PoA holders cannot sign the nomination registration / cancellation request.
- 3 Signature of the nominee or the guardian (in case nominee is a minor) should be furnished in the space provided.
- 4 The terms and conditions for registration of nominee(s) are as under:
  - (i) Nomination by an Applicant under the CAN shall be applicable for all the folios that are mapped / will be mapped to the CAN and the investments in the underlying schemes.
  - (ii) In case a CAN has joint holders, all joint holders should sign the request for nomination/ cancellation of nomination, even if the mode of holding is 'Anyone or Survivor'.
  - (iii) Every new nomination for a CAN will overwrite the existing nomination. Nomination will be subject to the provisions of the respective Scheme Information Document.
  - (iv) Nomination shall not be allowed in a CAN held on behalf of a minor Applicant.
  - (v) Nomination shall be mandatory for all new singly held CANs of individual investors. Else, Investors who do not wish to nominate are required to please indicate your preference to not nominate by ticking the check-box alongside "I/We do not wish to nominate please tick (✓)" and strike off the space provided in the table below to enter Nominee details, confirming their non-intention to nominate. In case nomination/non-intention to nominate is not provided by sole holder, the application is liable to be rejected.
  - (vi) Nomination can be made for a maximum of three nominees. In case of multiple nominees, the percentage of allocation/share in whole numbers and without decimals in favour of each of the nominees should be indicated against the name of the nominees. Such allocation/ share should total to 100 percent.
  - (vii) If the total allocation / share does not equal to 100 percent, the nomination is liable to be rejected. In the event the Unit holder(s) fail to indicate the percentage of allocation/share for each of the nominees, MFU will consider the nomination as equal amongst all the nominees and the Fund/ AMC, by invoking default option shall settle the claim equally amongst all the nominees.
  - (viii) In case of multiple nominees, on the death of one or more nominee, the transmission of units shall be made in favour of the remaining nominee(s).
  - (ix) Cancellation of nomination can be made only by those Unit holder(s) who hold Units on their own behalf either singly or jointly and who made the original nomination. On cancellation of nomination, the nomination shall stand rescinded and the Fund/ AMC shall not be under any obligation to transmit the Units in favour of the nominee(s).
  - (x) In case of investors opting to hold the Units in the depository account, the nomination details as available in the respective depository account will prevail.
  - (xi) Transmission of units in favour of Nominee(s) shall be valid discharge by the AMC against the legal heirs.

## Other Details:

- 1 Each applicant / guardian is required to provide the Income or Networth details as on a specific date, Occupation and their Political Exposure.
- 2 Politically Exposed Persons (PEP) are defined as individuals who are or have been entrusted with prominent public functions in a foreign country, e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/military officers, senior executives of state owned corporations, important political party officials, etc.

# J Declaration and Signatures:

1 The Application should be signed by all applicants and the signature(s) should be in English or in any Indian Language. Thumb impressions should be from the left hand for males and the right hand for females and in all cases to be attested by a Magistrate or Notary Public under his/her official seal. Applications on behalf of minors should be signed by their natural parent/legal Guardian.

# K <u>Documents to be attached:</u>

Applicants are requested to submit necessary documentary proof as listed below for the information provided in the respective sections of the CAN registration form:

- (1) PAN proof where PAN is provided
- (2) Proof of KYC for all applicants
- (3) Proof of Date of Birth for all applicants
- (4) Proof of Bank Account for Bank Mandates registered under the CAN
- (5) Proof of Depository Account for Depository accounts registered under the CAN
- (6) Proof of Guardian relationship (in case of Minor applicants)

Benefits of MF Utility

С	Account Number (CAN)	Single reference number for all investments in the Mutual Fund Industry
С	Transaction Form (CTF)	Single form for transactions in multiple schemes across Mutual Funds
N	Payment	Consolidated payment for investments in multiple schemes across Mutual Funds using a single CTF
N	KYC Process	Single KYC verification/registration at the time of CAN creation
С	Manuate Registration (CIVIN)	Single Mandate registered for multiple SIP Registrations using a single CTF
N	Complaints System	Single place for registering and tracking complaints for the Mutual Industry

Common Account Number (CAN)

		common Account Number (CAN)
0	Reference Number for all	No need to remember / maintain folios at Mutual Fund
	Mutual Fund Investments	
N	Account Opening Process	No need to fill separate Account Opening forms for each Mutual Fund
	Place for Investor Information	No need to submit change requests to each Mutual Fund to get changes updated to investor information
E	View for Investments	Consolidated view of all investments across Mutual Funds
	MIS for the Industry	No need to source & consolidate data from different Mutual Funds / RTA

Common Transaction Form (CTF)

-	0	Form for multiple transactions	No need to fill and submit separate transaction forms for transactions in different schemes/Mutual Funds. Burden
		*	of handling multiple documents reduced
1	N	Time-stamp for multiple	One time-stamp applied uniformly for all transactions in the form. Burden of submitting transactions at different
		transactions	offices / locations reduced
	EΓ	Payment Instrument for	No need to issue separate payment instruments for different schemes/Mutual Funds. Burden of handling multiple
		multiple investments	payment instruments reduced

Common Mandate Registration (CMR)

S	Mandate for multiple SIP	One common mandate can be registered for multiple SIPs registered under one CTF irrespective of dates,
1	Registrations	frequencies and amount.
N	Mandate for Lump sum	One common mandate can be registered under the CAN and used as a debit instruction as and when the investor
G	investments	chooses to invest in lump sum
L	Mandate for multiple payment	One common mandate registered can be used for triggering debit instructions for transactions initiated physically
E	modes	or through distributor or online

Common Complaint System (CCM)

		Common Complaint System (CCIVI)
S	Place for Registration	Complaints can be lodged at a single place for the entire Mutual Fund industry. No need to write to different
1	5000	entities at different addresses for any complaints related to Mutual Fund investments.
N	Place for Tracking	Complaints lodged can be tracked at a single place. No need to wait for the responses from the entities to know the
G		status of the complaint. The entire history of the complaints can be tracked online at one place.
L	Place for Redressal	Complaints lodged can be redressed or reassigned to an appropriate authority for resolution. The resolution status
E		can be updated instantly at one place.