

## **COMMON APPLICATION FORM**

For first time investors for Lumpsum Investments / SIP Investments / Zero Balance folio registration.

(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 ARN 94	466				Sub ARN	o-Dist	tribut	lor							terr	nal S	Sub	-Bro	ker	-/				_	Арр	olico		[ 1 N	
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Second Applicant Mr.	Ms. M/s.				SECO	ND AI	PPLICA	ANT						Gender	·  <u> </u>	M	F	:	0
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GUARDIAN DETAIL	<b>S</b> (In case Firs	st / Sole	e Applic	ant is min	or) / CONTAC	CT PERSC	DN - DES	IGNA	TION / I	PoA H	OLDER	(In case	e of I	Non-inc	livid	ual Ir	vesto	rs)	
Mr. Ms. M/s.					GUARD	LANI								6 1		М	☐ F		0
					GUARD	IAN								Gender		741			
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	Plac	ce / City of Birth	Coun	try of Birth	Co	untry of Citizenship /	Nationality
First Applicant / Guardi	an				Indian	U.S. Others	
Second Applicant					Indian	U.S. Others	
Third Applicant					Indian	U.S. Others	
If 'YES' please fi	I for ALL countri	re you assessed for es (other than India) sident / Green Card	in which you d	are a Resident	for tax purpose	Yes No	)
e. where yee a	Country Tax Reside	of Tax Identifi	cation Numb	er or Ide	ntification Type other please specify)	Addres	s Type
irst Applicant / Guardiar	1					Resi Regd.	Office Busin
econd Applicant						Resi Regd.	Office Busin
hird Applicant						Resi Regd.	Office Busin
Overseas Address		<u> </u>					
					С	ty	
ate			Country			Zipcode	
	lutual Fund		are availabl	e on the web	ite of AMC i.e. www.c	ixismf.com or at the I	Investor Service
3. NOMINATION DET	AILS (Mandatory)	(Refer Instruction No. 18)	Allocation	Relationship	Nominee date	Guardian Name	Guardi
3. NOMINATION DET	AILS (Mandatory)				Nominee date of birth	Guardian	Guardi
7. NOMINATION DET	AILS (Mandatory)	(Refer Instruction No. 18)	Allocation	Relationship with	Nominee date	Guardian Name	Guardi
r. Nominee	AILS (Mandatory)	(Refer Instruction No. 18)	Allocation	Relationship with	Nominee date of birth	Guardian Name	Guardi
7. Nominee	AILS (Mandatory)	(Refer Instruction No. 18)	Allocation	Relationship with	Nominee date of birth	Guardian Name	Guardi
r. Nominee	AILS (Mandatory) Name	(Refer Instruction No. 18)	Allocation	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y	Guardian Name (in case of Minor	Guard
7. NOMINATION DET	AILS (Mandatory) Name	(Refer Instruction No. 18)	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y	Guardian Name (in case of Minor	Guard Signate
7. Nominee 1 1 2 3 1/We DO NOT wish	AILS (Mandatory)  Name	PAN PAN and sign here	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y  Second Applia	Guardian Name (in case of Minor	Guard Signate
7. Nominee 1 1 2 3 1/We DO NOT wish	AILS (Mandatory)  Name	PAN PAN and sign here	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y  Second Applia	Guardian Name (in case of Minor	Guardi Signatu
7. Nominee 1 Nominee 2 Nominee 3 I/We DO NOT wish 4. INVESTMENT DETA	AILS (Mandatory)  Name	PAN  PAN  cand sign here	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y  Second Applic	Guardian Name (in case of Minor	Guardi Signati hird Applicant
1 2 3 I/We DO NOT wish 4. INVESTMENT DETA Sr. No.	AILS (Mandatory)  Name	PAN  PAN  cand sign here	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y  Second Applic	Guardian Name (in case of Minor	Guardi Signatu hird Applicant
Nominee  Nominee  Nominee  Nominee	AILS (Mandatory)  Name	PAN  PAN  cand sign here	Allocation (%)	Relationship with Investor	Nominee date of birth  D D M M Y Y  D D M M Y Y  Second Applie  Plan  Direct Regula	Guardian Name (in case of Minor )  Tr' against scheme name,  Option	Guard Signate

In words

Total

In figures

5. PAY	MENT DETAILS			8=
N	on-Third Party Payment Th	ird Party Payment (Please attach 'Third Po	arty Payment Declaration Form')	
Mode	Crieque DD (Pleas	Bank Debit Mandate Date D	D M M Y Y Y Y Chequ	ue / DD No.
Amount (in figure	5)	(in words)		
Pay-in A/	c No.			
Account t	ype Savings Curr	ent NRE NRO FCN	R Others	Specify
IFSC code	(11 digit)	MICR Cod	e (9 digit)	
Drawn o	n bank / branch name & addre	ess		
6. DEN	AT ACCOUNT DETAILS (OPT	IONAL)		
(Please	ensure that the sequence of nam	es as mentioned in the application form mo	tches with that of the A/c held with the dep	ository participant) Refer Instruction No. 19.
	Depository Participant Name		DP I	D: I N
NSDL:	Beneficiary A/c No.			
CDSL:	Depository Participant Name Beneficiary A/c No.  ed Client Master	Transaction / Statement Copy / DIS	Сору	
7. DEC	LARATION AND SIGNATURE			
understoc source on Act, Anti A been indu "Know Yo Scheme, i the law.) T Mutual Fu policy whi my invest	In the terms, conditions, details, by and does not involve designed toney Laundering Laws, Anti Corned by any rebate or gifts, directur Customer" process is not compared to the ARN holder has disclosed to nds amongst which the Schemeich is available on the website of the ment related queries and/or reconstructions.	If the SID / KIM of the scheme and SAI of the Arrules and regulations governing the schem for the purpose of the contravention of any rruption Laws or any other applicable laws etly or indirectly in making this investment. I poleted by me/us to the satisfaction of the Mupplicable NAV prevailing on the date of sucme/us all the commissions (trail commissions being recommended to me/us. I/we give he AMC / Fund. I/We give my consent to Alceive communication pertaining to transaly blocking preferences with the Customer Province of the scheme of th	ne. I/We hereby declare that the amount in Act, Rules, Regulations, Notifications or Denacted by the Government of India from time. We confirm that the funds invested in the Statual Fund, (I/we hereby authorize the Mutuh redemption and undertake such other act on or any other mode), payable to him for the my our consent to collect personal data and the graph of the confirmation of the my of the confirmation of the my our consent to collect personal data and the graphs of the confirmation of the my our consent to confirm me over phone ctions/ non-commercial transactions/ processing the confirmation of the confirmation o	vested in the scheme is through legitimate irectives of the provisions of the Income Tax me to time. I/we have not received nor have Scheme, legally belongs to me/us. In event al Fund, to redeem the funds invested in the ion with such funds that may be required by he different competing Schemes of various or information as prescribed in the privacy, SMS, email or any other mode to address
₹50,000 that I/We	n a year (Applicable for Micro inv	isting Micro SIP/Lumpsum investments whi restment only.) with your fund house. For NR I through approved banking channels or fr s are true and correct.	lls only - I / We confirm that I am/ we are No	n Residents of Indian nationality/origin and
provided		he information requirements of this Form (rrect, and complete. I / We also confirm tha		
usage (ii) I/ We here	validating/authenticating and (ii) by provide my/our consent for s	provide my/our consent in accordance wit updating my/ our Aadhaar number(s) in a haring/disclosing of the Aadhaar number( ur and Transfer Agent (RTA) for the purpose o	ccordance with the Aadhaar Act, 2016 (and s) including demographic information with	d regulations made thereunder) and PMLA. the asset management companies of SEBI
You	/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder

Date D D M

Place

Τo

Ωr

SIP Scheme 2

SIP Scheme 3



## SIP REGISTRATION FORM Application No. Sub-Distributor Internal Sub-Broker Distributor Sol ID ARN ARN 94466 **Employee EUIN** E100406 RIA CODE^ Code Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. ^I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/ NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. "I/We hereby confirm that the EUIN 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." You/ Sole Applicant /Guardian Second Applicant Third Applicant Power of Attorney Holder TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Instruction No. 20) I confirm that I am an existing investor across Mutual Funds. I confirm that I am a first time investor across Mutual Funds. In case the subscription amount is ₹ 10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/subscription amount and payable to the Distributor. Units will be issued against the balance amount invested. **EXISTING INVESTOR'S FOLIO NUMBER** have an existing folio with KYC validated, please mention here) 1. YOUR INFORMATION (MANDATORY) Your Name (as in PAN Card / KYC records) Mr. Ms. M/s Name of the Guardian Mr. Ms. M/s 2nd Holder PAN Your PAN Type your tex 3rd Holder PAN DO NOT FILL THE MANDATE BELOW, IF OTM DETAILS ARE PROVIDED IN SECTION 2 ON THE NEXT PAGE. To register Axis One Time Mandate, please fill and submit the One Time Mandate form separately. **UMRN** Date Tick (✓) Sponsor Bank Code **Utility Code** CREATE 🗸 I/We hereby authorize **Axis Mutual Fund** to debit (tick < ) SB CA CC SB-NRE SB-NRO Other MODIFY X Bank a/c number CANCEL X **IFSC** or MICR with Bank an amount of Rupees FREQUENCY x Otly X H-Yrly X Yrly ✓ As & when presented **DEBIT TYPE** X Fixed Amount ✓ Maximum Amount Reference 1 Phone No. Reference 2 All Schemes of Axis Mutual Fund **Email ID** I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my accounts as per latest schedule of charges of the bank **PFRIND** From Signature Primary Account holder Signature of Account holder Signature of Account holder Until Cancelled Name as in bank records Name as in bank records Name as in bank records This is to confirm that the declaration (as mentioned overleaf) has been carefully read, understood & made by me / us. I am authorizing the User Entity / Corporate to debit my account, based on the instructions as agreed and signed by me. I have understood that I am authorized to cancel / amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / Corporate or the bank where I have authorized the debit. MANDATORY FIELDS: • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date or until cancelled • Account holder signature • Account holder name as per bank records. Reference 1 - PAN. ACKNOWLEDGMENT SLIP (To be filled by the investor) Investor Name SIP Scheme 1 Top-up Yes Νo

Top-up

Top-up

Yes

Yes

No

No

Stamp & Signature

2. SIP DETAILS			SIP Registration I	Mode A-OTM	K-OTM Mandate along with SIP form
OTM Reference No.					(if Multiple One Time Mandate are registered
Scheme / Plan / Option	Frequency	SIP Date	Enrollment Period	SIP Amount	TOP-UP Facility (Optional) Only available for Monthly SIP
	Monthly	()	From	₹ in figures	Frequency Amount  ☐ Half Yearly ₹ in figures
	Yearly	Default	To	in figures	Yearly
	_	SIP Date 7th		in words	in words  Dynamic TOP-UP
	_ Monthly		From	₹ in figures	Half Yearly ₹ in figures
	Yearly	Default SIP Date 7th	То		Yearly —
	_	SIP Date /fr	or 1299	in words	in words  Dynamic TOP-UP
	_ Monthly		From	₹ in figures	Half Yearly ₹ in figures
	_ Yearly	Default SIP Date 7th	То	in words	Yearly in words
	_		or 1299	III Words	Dynamic TOP-UP
SIP initial payment details (Option	al)				
Drawn on bank / branch name				Amou	ınt
Mode Cheque/DD Cheq	je/DD		Da	ted D D M M Y	YYY
n case of multiple SIP, mention "Ax	s MF Multiple S	chemes" on th	e payment instrument.		
3. Declaration and Signature	to be signed	by all unit h	olders if mode of holdi	ng is 'joint')	
ayment of SIP installments and/ or a me to time. If the transaction is delay lso inform Axis Mutual Fund about o	ny lumpsum pay ed or not effected ny changes in n	ments through I at all for reason by bank accou	an Electronic Debit arrang ons of incomplete or incorr nt. I/We hereby authorize t	ement / NACH (National Auto ect information, I/We would no honour such payments and	roviders to debit my / our bank account toward omated Clearing House) as per my request fror oot hold the user institution responsible. I/We wi I have signed and endorsed the Mandate Form ges, if any, may be charged to my/our account.
You/ Sole Applicant /G	vardian		Second Applicant		Third Applicant

## INSTRUCTIONS FOR SIP & TOP-UP

- Multiple SIP registration facility is not available for Axis Children's Gift Fund, Axis Liquid Fund, Gold ETF and during NFO.
- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 21 days before the first SIP Installment date.
- Investors shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day.
- 11. Please refer below table for minimum amount per installments:

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Scheme	Minimum Amount (₹)	Minimum Installments
All Schemes except Axis Liquid Fund	1000	6
Axis Long Term Equity Fund*	500	6

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of ₹500\*.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹ 1,000/-.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing.
- The SIP will be discontinued automatically if payment is not received for three successive
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- received at least 20 days prior to the due agte of the next installment / debit.

  Mandate will be processed through NACH platform offered by NPCI.

  As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following:

  \*\*For Existing / New investors: ₹100 / ₹150 as applicable por subscription of
  - For Existing / New investors:  $\ref{100}$  /  $\ref{150}$  as applicable per subscription of  $\ref{10,000}$ /– and above.
  - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to ₹10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful installments.
  - There shall be no transaction charge on subscription below ₹10,000/-
  - There shall be no transaction charges on direct investments.
  - There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.
  - Transactions carried out through the Stock Exchange platforms for mutual funds shall not be subject to transaction charges.

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

However, the option to charge "transaction charges" is at the discretion of the distributors.

Investors may note that distributors can opt to receive transaction charges based on type of the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable.

- subscription amounts, as applicable. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
- Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it.
- TOP-UP Facility: Under this facility the Investor can increase the SIP installment at predefined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details
  - The minimum amount for Axis TOP-UP facility is ₹500/- and in multiples of ₹1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹500 and in multiples of ₹500 thereafter.
  - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹500/- for all schemes.
  - TOP-UP frequencies available are Half-Yearly/ Yearly/ Dynamic requested intervals.
  - In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
  - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
  - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6 months from the date of the first installment and minimum gap between two top up requests should be 3 months and amount specified in last
  - request shall be continued till the End of the SIP tenure.
    Please see the illustration below to know how to calculate SIP Top-Up amount:
  - SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹1000

Top-Up amount is ₹500 · Top-Up Frequency is Half-yearly

Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000



## ONE TIME MANDATE (OTM) FORM

One Time Mandate (OTM) is a common application form for registration of mandate centrally and not being folio specific.

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