

MoneyBuddy, Advisory by: Kamal Wadhwani,CFA

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Account Opening Form (AoF)

Applicant's Personal Details

Name:	
Gender:	
Phone No:	
Email ID:	
Pan Card:	
Occupation:	
Date of Birth:	
Address line 1:	
Address line 2:	
City:	
Pin Code:	
State:	
Country	

Bank Details

Bank Name:	
Type: S/B or Current	
Account Number:	
IFSC Code:	

Nominee Details (Optional)

Nominee's Name	
Relationship:	

Declaration:

I confirm that I have verified the details given above and the same are true and correct. I have invested or desirous to invest in the Scheme(s) Mutual Fund under Direct Plan and agree to comply with the terms and conditions of the Scheme related documents.

I hereby give you my consent to share/provide the transactions data feed/portfolio holdings/ NAV etc. in respect of my/our investments under Direct Plan of all Schemes managed by you, to the above-mentioned RIA.

Finally, I have understood the advisory fees charged by Mr. Kamal Wadhwani, SEBI Registered Advisor and that the same is subject to change prior to notice.

Applicant's signature

SIP Mandate Form

We work in partnership with Bombay stock exchange (BSE) to enable secure automated debit of your monthly SIP amounts.

Your unique reference number, required to enable SIP auto-debit facility is given below:

Investor Name:	
Bank A/C	
URN Number:	

Please follow the below procedure to enable auto debit:

1. Login to Internet banking
2. Search for register biller
3. Add 'BSE Limited' as payee
4. Enter the above URN

Key FAQs

Why money is being transferred to BSE for my investments?

Bombay stock exchange (BSE), works with over 40 mutual fund companies to enable secure online investments for their investors. We are registered with BSE and funds are directly transferred to BSE who processes the investments on behalf of different mutual funds.

What is maximum money that can be debited from my account?

Money is only debited against your SIPs and is equal to total SIP amount. As a protection measure, we have put a hard limit of 2 Lacs at BSE's end which is the maximum money that can not be debited from a bank account in one day.

Additionally, most banks allow customers to enter their own maximum limit while adding 'BSE Limited' as a payee.

How do I stop this autodebit in Future?

The autodebit facility is only used for your SIPs. If you stop all your SIPs, the debits will also stop automatically.

If needed, you can login to your internet banking and cancel the BSE from your registered billers list. This will stop autodebit of all your future installments.

