

PLEASE REFER TO THE PRODUCT LABEL SECTION ON PAGE I BEFORE FILLING THIS FORM

Common Application Form (except for Tata Retirement Savings Fund & Tata Young Citizens' Fund)

Sr. No.:



1. DISTRIBUTOR INFORMATION (Only empanelled Distributors / Brokers will be permitted to distribute Units of Tata Mutual Fund) refer instruction A16 & K FOR OFFICE USE ONLY (TIME STAMP) SUB-BROKER / BANK **BROKER / AGENT CODE** SUB-BROKER ARN CODE **EUIN CODE BRANCH CODE ARN 102683** E 024075 🔲 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. TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Inst. A15 and please tick (1/2) any one) I confirm that I am a First time investor across Mutual Funds. I confirm that I am an existing investor in Mutual Funds. (Rs. 150 deductible as Transaction Charge and payable to the Distributor) (Rs. 100 deductible as Transaction Charge and payable to the Distributor) In case the purchase / subscription amount is Rs. 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. Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor. 2. EXISTING UNITHOLDER INFORMATION (please fill in your Folio Number, Name & proceed to Scheme Investment Details) Name of Sole/1st Applicant: Existing Folio Number: 3. APPLICANT'S PERSONAL DETAILS (Fill in Block Letters, use one box for one alphabet leaving one box blank between two words, as it appears in your Bank A/c & KYC letter) NAME OF FIRST / SOLE APPLICANT Μs M/s Date of Birth Ist holder PAN/PEKRN Manda KYC Copy attached Birth Certificate School Leaving Certificate Other Proof of DOB (Mandatory for minor) **Passport** KYC DETAILS (Mandatory) 1st Unitholder Private Sector Service **STATUS:** Resident Indian NRI PIO OCCUPATION: Gross Annual Income: Below | Lac For Individuals: Politically Exposed Person ☐ I-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ HUF ☐ Minor RI ☐ Minor NRI Public Sector Service Business Retired Related to Politically Exposed Person ☐ Trust ☐ Proprietorship ☐ LLP ☐ Government Sector ☐ Agriculturist ⇒ 25 Lacs-I crore ⇒ I crore ☐ Not Applicable Partnership Public Ltd. Co. Professional Forex Dealer Networth in (Mandatory for Non-individual) For Non-Individual Investors (Companies, Trust, Pvt. Ltd. Co. Non Profit Organisation Housewife Student Partnership etc): Is the company a Listed Company or ☐ Societies ☐ FOF ☐ Body Corporate Others (please specify) Subsidiary of Listed Company or or Controlled by a Listed Others(please specify) Company: (if No. please attach mandatory UBO declaration): ☐ Yes ☐ No Gaming / Gambling / Lottery / Casino Services Money Lending / Pawning None of the above **DETAILS UNDER FATCA / FOREIGN TAX LAWS** Country of birth Country of Residence Citizenship Are you a resident in any country other than India for tax purposes.

Yes □ No If yes, please indicate all countries in which you are resident for tax purposes and the associated Foreign Tax Identification Number below. **Country of Tax Residency** Tax Identification Number For Non Individual Investor, Please tick the relevant box below, even if Country of Tax Residency is India # ☐ Form W8 BEN-E / Specified declaration (Enclosed) ☐ Unable to Provide [Tata Mutual Fund will contact you in due course to confirm your FATCA Status] # Where no box is ticked, the second statement will be taken as the default implying that the applicant / investor currently is unable to confirm FATCA status and will confirm the same in future. ACKNOWLEDGEMENT SLIP (TO BE FILLED BY THE INVESTOR) Sr. No.: Received Subject to realisation and verification an application for purchase of units as mentioned in the application form. from Scheme Amount Cheque no.

Second applicant details Mr. Ms.	
Name Name	
and holder PAN/PEKRN M a n d a t o r y KYC Copy attached	ı
	isiness Professional Agriculturist Retired
☐ Housewife ☐ Student ☐ Forex Dealer ☐ O	thers
GROSS ANNUAL INCOME: Below Lac I-5 Lacs 5-10 Lacs 10-25	
Networth in ₹as on □□□□	(1100 0.001 0.1011 1 / 0.01)
<u>OTHERS:</u> ☐ Politically Exposed Person ☐ Related to Politically Exposed Person ☐ Not Applica	ble #MANDATORY
DETAILS UNDER FATCA / FOREIGN TAX LAWS	
Country of birth Country of Residence Are you a resident in any country other than India for tax purposes. Yes No	Citizenship
If yes, please indicate all countries in which you are resident for tax purposes and the associated Foreign Ta	ax Identification Number below.
Country of Tax Residency	Tax Identification Number
Third applicant details Mr. Ms.	
Name	
Brd holder PAN/PEKRN Mandatory KYC Copy attached	
	siness Professional Agriculturist Retired
☐ Housewife ☐ Student ☐ Forex Dealer ☐ Of GROSS ANNUAL INCOME: ☐ Below Lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25	thers
Networth in ₹	
OTHERS: □ Politically Exposed Person □ Related to Politically Exposed Person □ Not Applica	ble
DETAILS UNDER FATCA / FOREIGN TAX LAWS	
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Are you a resident in any country other than India for tax purposes. Yes No If yes, please indicate all countries in which you are resident for tax purposes and the associated Foreign Tax	y Identification Number below
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Guardian details	Tax Identification Number
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Guardian details Name of Guardian (In case of Minor) Contact Person/Designation (In case of non-individual Inves Guardian's PAN/PEKRN M	Tax Identification Number Mr.

Pin State Country Phone O (STD Code) Extn. Fax R (STD Code) Mobile E-mail → (IN CAPITAL) [If you wish to receive Account Statement / Annual Report / Other Statutory Information via Post instead of Email (Refer Inst. – C9)]. Overseas Address (Mandatory in case of NRI applicant in addition to mailing address) Zip code City Country 5. FIRST HOLDERS BANK ACCOUNT DETAILS (Mandatory) Refer Instruction I and I		
Phone O (STD Code) R (STD Code) E-mail → (IN CAPITAL) [If you wish to receive Account Statement / Annual Report / Other Statutory Information via Post instead of Email (Refer Inst. – C9)]. Overseas Address (Mandatory in case of NRI applicant in addition to mailing address)		
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Overseas Address (Mandatory in case of NRI applicant in addition to mailing address) Zip code City Country		
Zip code City Country		
E FIRST HOLDERS BANK ACCOUNT DETAILS (Mandatons) Polos Instruction Land		
All communication/payments will be made to first applicant or to Karta in case of HUF. Bank account details of First Unitholder required without	which the app	olicat
would be rejected.		
Name of the Bank		
Branch Account Type Savings Current NF	RO NRNR	NF
Account No. (in Fig.)		
Bank Address		
City State PIN		
^MICR Code		
^ (To be filled in only if dividend is to be paid through ECS). * This is a 11 Digit Number, kindly obtain it from your Bank Branch. (Cancelled cheque is Modern to the control of the con	nandatory)	
Options: Growth Dividend For Dividend option only: Sub-Option: Payout option: Payout	☐ Reinvestmer	ent
7. MY INVESTMENT GOAL (choose anyone (√) (Refer Instruction E)		
☐ Marriage ☐ Vacation ☐ Dream Home ☐ Dream Car ☐ Retirement ☐ Children's Education ☐ Children's Marriage.		
Target Amount Rs		
8. INVESTMENT DETAIL (Strike off whichever is not applicable)		
Gross Amount (A) DD Charges (if any) (B) Net Amount (Cheque / DD Amount)		
Mode of Payment Dated		
A/c No	/ Y Y	Y 1
A/c Type Cheque / DD No.		
A/c Type Cheque / DD No. Drawn on Bank		

9. NOMINA	ATION DETAILS (To be filled in by Inc	ividual(s) applying singly	or jointly) Ref	r Instruction M	1 (MANDATORY)
Please select	any one of the follows:				
Please re	egister nomination as requested below (pleas	e fill the nomination form b	pelow) 🔲 I wi	h to nominate m	nultiple nominees (please strike out the form below & fill
seperate form	m attached herewith) 🗌 I do not wish to no	minate.			
	hat all payments and settlements made to su				edit in my/our folio in the event of my/our death. I/We receipt thereof, shall be a valid discharge of the AMC /
Name			Addre	:s	
			Nomin	oo's rolationship :	with 1st holder
			INOITIIII	e s relationship	With 1st floider
If Nominee	is Minor:				
Date of Birth	Proof of D	OB Birth Certificate	School Leaving	Certificate F	Passport Others
Name & Add	lress of Guardian:				
	of the Nominee with the Guardian Moth				Sign of Nominee/Guardian (in case of minor nominee)
Proof of relat	tionship: Birth Certificate School Leavi	ng Certificate Passport	Others		
IO DEMAT	ACCOUNT DETAILS: /Discours and add				State of the control of the December December 1
	holders do not provide their Demat Account				with that of the account held with the Depository Participant).
National	Depository participant Name			Depository part	ticinant Name
Securities	Depository participant (Name		Central	Depository part	ucipant Name
Depository	DP ID No.		Depository Securities		
Limited	Beneficiary Account No.		Limited	Target	
	,			ID No.	
II. DECLAI	RATION AND SIGNATURES. Refer Inst	ruction - C			
The Trustee,	Tata Mutual Fund				
a.) Having rea	ad & understood the contents of the Scheme	Information Document of	the Scheme & r	einvestment sch	eme, I/ We hereby apply for units of the scheme $\&$ agree
to abide by th	ne terms, conditions, rules & regulations gove	rning the scheme. I/ We he	ereby declare the	t the amount inv	vested in the scheme is through legitimate sources only $\&$
does not invo	lve & is not designed for the purpose of the o	ontravention of any Act, R	ules, Regulations	, Notifications or	r Directions of the provisions of the Income Tax Act, Anti
Money Laund	ering Laws, Anti Corruption Laws or any oth	er applicable laws enacted	by the Govt. of	India from time t	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 mak	ing this investme	ent. I/ We confirm that the funds invested in the Scheme,
legally belong	to me / us. In the event "Know Your Custom	er" process is not complet	ed by me / us to	the satisfaction of	of the AMC, I/ We hereby authorise the AMC, to redeem
the funds inve	ested in the Scheme, in favour of the applicant	at the applicable NAV prev	ailing on the dat	of such redemp	otion & undertaking such other action with such funds that
may be requir	red by the Law. b.) For NRIs: I/ We confirm	that I am / we are Non Res	idents of Indian	Nationality / Orig	gin & that I/ we have remitted funds from abroad through
approved ban	king channels or from funds in my / our Non-	Resident External / Non-Re	esident Ordinary	. I/ We confirm tl	hat details provided by me / us are true & correct. c) The
ARN holder h	as disclosed to me/us all the commissions (in t	he form of trail commissior	or any other me	ode), payable to h	nim for the different competing Schemes of various Mutual
Funds from ar	mongst which the Scheme is being recomme	nded to me / us. d.) I/We	have read & und	lerstood the SEB	BI Circular no. MRD/DoP/Cir- 05/2007 dt. April 27, 2007
& SEBI Circula	ar No. 35/MEM-COR/18/07-08 dt. June 26, 2	2007 regarding mandatory	requirement of	AN. I/We confir	m that I/we are holding valid PAN card / have applied for
PAN. e.) The	ARN holder has disclosed to me/us all the co	ommissions (in the form of	trail commission	or any other mo	ode), payable to him for the different competing Schemes
•	tual Funds from amongst which the Scheme i	•		,	,,,,
	S	J	·		Date:
Ist U	Initholder Signature / Thumb Impression	2nd Unitholder Sign	ature / Thumb In	pression	3rd Unitholder Signature / Thumb Impression



NOT TO BE USED FOR TATA RETIREMENT SAVINGS FUND

SIP AUTO DEBIT FACILITY – WITH TOP-UP FACILITY



NEW INVESTORS ARE REQUESTED TO FILL-IN THE SCHEME APPLICATION FORM ALSO

REGISTRA	TION CUM MANDATE FO	DRM FOR ECS (Debit	: Clearing / Standing	Instruction / Dire	ect Debit Facility i	n select banks only)
First SIP cheque and subsequ	ent via Auto Debit in select	cities only. (Please atta	ach copy of cheque	/ cancelled chequ	ie)	,,
Please (✓) any one : Ne	w Registration	Change in Bank Acc	ount for existing	Registration	MICRO SI	P (refer inst. 4)
I. DISTRIBUTION INFORM	MATION (Only empanelled Distrib	oution/Broker will be permitte	ed to distribute Units of	Tata Mutual Fund) refe	r instruction AI6 & K	FOR OFFICE USE ONLY (TIME STAMP)
Broker / Agent Code	Sub-Broker / Bank Branch	n Code Sub-Brol	ker ARN Code	EUIN	Code	
ARN 102683				E 02	4075	
	son of the above distributor,	, ,			,	eraction or advice by the employee/ ovided by the employee/relationship
Sole / Ist Unitholder Signat	cure / Thumb Impression	2nd Unitholder S	Signature / Thumb	Impression	3rd Unitholde	er Signature / Thumb Impression
2. TRANSACTION CHARG	GES FOR APPLICATIONS	THROUGH DISTR	IBUTORS ONLY	(Refer Inst. Al	5 and please ti	ick (√) any one)
Rs. 150 deductible as T	time investor across Mutual F Fransaction Charge and pay			that I am an exist		utual Funds. e and payable to the Distributor)
transaction charges, the same a	re deductible as applicable fro issued against the balance of t	m the installment amou the installment amount	unt and payable to t invested. Upfront	he the distributor. commission shall l	In such cases tran	your Distributor has opted to receive nsaction charge will be recoverable in the investor to the AMFI registered
3. APPLICATION DETAILS	5					
Folio No.			Application	No.		
Name of Sole / 1st holder				PAN No.	/ PEKRN. MI	a n d a t o r y KYC#
Name of 2nd holder				PAN No.	/ PEKRN.	a n d a t o r y KYC#
Name of 3rd holder				PAN No.	/ PEKRN.	a n d a t o r y KYC#
						# Attach Acknowledgement Copy
National Securities Depository Limited Depository partic DP ID No. Beneficiary Acco 5. SCHEME DETAILS Refer II	unt No.		Depository Securities	epository participar	IL Name	
Scheme / Plan:						
Options: Growth	ividend					
For Dividend option only: Su	b-Option:		Payout	option: Payo	ut Reinve	stment
6. MY INVESTMENT GOAL	(choose anyone (√) (Refer Inst	ruction E)				
☐ Marriage ☐ Vacation ☐ Dr	eam Home Dream Car	Retirement Children	i's Education Chi	Idren's Marriage		
Target Amount Rs.						
7. FIRST SIP CHEQUE DETA	ILS					
Cheque No.:	Cheque Amor	unt in ₹			Cheque Date :	D D M M Y Y Y Y
Bank Name	· ·	Branch:			_ City:	
Mutual Fund Scheme/s at NAV to complete & express my willingne	pased resale price & agree to all ess to make payments through p erms & conditions mentioned o	bide by terms, condition participation in ECS/Direct overleaf. For Micro SIP: I/	s, rules & regulation ct Debit/Standing Ins We hereby declare tl	s of scheme/s. I/We truction. I/We will a nat I/We do not hav	e hereby declare tl also inform TAML, a	apply for the respective Units of Tata nat the particulars given are correct & about any changes in my bank account. o SIPs which together with the current
SIGNATURE/S AS PER TATA MUTUAL FUND RECORDS						
(MANDATORY) Sole	e/Ist Account Holder's Signa	ature 2nd	d Account Holder'	s Signature	3rd Ad	count Holder's Signature
ACKNOWLEDGEMENT SLII	P (TO BE FILLED BY THE	INVESTOR)	T/	ATA MUTUAL F	UND	ISC Stamp & Signature
Received from Mr./Mrs.						
Scheme/Plan/Option						

Subject to realization of funds and verification of mandatory information/document.

SIP Installment Amo	ount (₹)								Amou	ınts in wo	ords													
Frequency	rune (t)		Enrol	llment	t Period	l: (Plea	ıse √a	ny one)				Date	es:											
Monthly (Defau	lt)	gular			MYY		Y to:			V V V	,		ention t	ho da	to									
Quarterly	,	_								1 1 1 1	1	ords	ention t	ne ua	LE _							day	of the	month.
(Please tick any	one)	•	al From				Y to:	1 2	2	0 9 9	1		D 10	N.I. I.				_	1 -			•		monun.
(* 15	(0	Default	:) (Refe	r Instru	uction N	lo. 12)					-		P on 10 fer inst								,		month	
9. SIP TOP UP (Op	tional) (tick	to ava	ul this fa	cility)	(Refer	instruc	tion 15	5)																
T 11 A .**				Ploas	e Specif						Тор	Up	Freque	ncy:		Half \	'early		Yea	ırly (D	efau	t)		
Top Up Amount* - *Top Up amount ha			s of Ds			7					Up	per S	IP Amo	ount										
тор ор атоште па	is to be in the	intiple	3 01 13.	300 0	''''y						Rs.													
10. PARTICULAR	S OF BANK	CAC	COUN	т																				
Account holder Nam																						Т		
as in Bank Account Bank Name																								
Branch Name													City											
9 Digit MICR Code								(pl	ease e	enter the	9 digit ı	numb	er that	appea	ars af	ter th	e ched	que nu	umb	er)				
Account Type (Please	e Tick)		Saving	gs	Curr	ent	NRO	0 🗆	NRE	FC	NR													
Core Banking A/c. N	0.																							
II. DECLARATION	N TO THE BA	ANKE	R																					
To - Branch Manager					E	Bank. T	his is to	o inform	I/We	have regi	stered	for RI	BI's Elec	ctroni	c Cle	aring	Servic	e (De	ebit (Cleari	ng)/ [irect	Debit	Standing
Instruction Facility &				•							,								•					
I/We authorize the re received from the Ba	•		-				-				_							_	-		•			
standing instruction.							,		iatsoc	VCI. 1/ VVC	undert	are u	o keep s	sumci	ziit iu	IIUS II	tile it	an iuni ig	z acc	.Ourit C	ni tile	uate		Cution o
Bank responsible. I h	ave read and						or reaso	ons of in	comp	lete or inc	orrect	infor	mation,	, I/We		ld not	hold	Tata N	- 1utu	al Fun	d or t	he at	ove m	entioned
		-					s menti	ioned ov	verlea	f. I/We ha	ve note	ed the	e conte	nts of	wou the	Direc	t Deb	it Fac	ility	Agree	ment	/Stan	ding In	struction
entered by Tata Muti	ual Fund with	the Ba	nk & I/v	ve are	also bo	und by	s menti	ioned ov	verlea	f. I/We ha	ve note	ed the	e conte	nts of	wou the	Direc	t Deb	it Fac	ility	Agree	ment	/Stan	ding In	struction
entered by Tata Mute transaction dishonou	ual Fund with	the Ba	ank & I/v	ve are	also bo	und by	s menti	ioned ov	verlea	f. I/We ha	ve note	ed the	e conte	nts of	wou the	Direc	t Deb	it Fac	ility	Agree	ment	/Stan	ding In	struction
transaction dishonou	ual Fund with	the Ba	ank & I/v	ve are	also bo	und by	s menti	ioned ov	verlea	f. I/We ha	ve note	ed the	e conte	nts of	wou the	Direc	t Deb	it Fac	ility	Agree	ment	/Stan	ding In	struction
signature/s AS PER BANK	ual Fund with	the Ba	ank & I/v	ve are	also bo	und by	s menti	ioned ov	verlea	f. I/We ha	ve note	ed the	e conte	nts of	wou the	Direc	t Deb	it Fac	ility	Agree	ment	/Stan	ding In	struction
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