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Mutual Fund

From Scheme (in case of switch)

COMMON TRANSACTION FORM (for One Transaction Only) (for Retail Investors)

To Scheme

FOLIO NUMBER (Mandatory) :																				Date :	D D	MM	Υ
1st Holder Name 2nd Hold										Holder N	er Name 3rd							3rd Ho	rd Holder Name				
PAN Number KYC Complied PAN Number										KYC Complied PAN Number KYC Con							KYC Comp	lied					
ADDITIONAL PURCHASE (Cheque/DD paymentfavouring "Scheme Name") ReferInstNo. 3, 4 & 5								REDEMPTION															
Scheme: BSL	Plan :								_ '	Scheme: BSL							Plan :						
Option:	Amount (Rs.):							Option:				Please redeem (Rs.):											
DD Charges*: Net Amount (Rs.): Chq/DD No.:							_	or			units.												
Dated : D D M M Y Y payable to the above scheme drawn on(Bank Name & Branch Address)								- I	SWITCH														
In case you do not mention the Plan and Option, units will be alloted under default option as per respective scheme(s) offer document. *To be filled by investors residing at the location where the AMC Branches / Collection centre are not located								- I	I/We would like to switch Rs units from														
To be filled by investors residing at the location where the AMC Branches / Collection centre are not located DECLARATION(S) & SIGNATURE(S)								S	Scheme / F	Plan <u>BSI</u>	-		Option										
To,								- 1	o Scheme	/ Plan <u>[</u>	BSL		Option										
The Trustee, Birla Sun Life Mutual Fund Having read and understood the contents of the Offer Document/Statement of Additional Information / Scheme Information Document of the Scheme,								ne.	REDEMPTION / DIVIDEND REMITTANCE														
I/We hereby apply for units of the scheme and agree to abide by the terms, conditions, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate sources only and does not involve and is not designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions of the provisions of the income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the government of India from time 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 making this investment. I/We confirm that details provided by me/us are true and correct.						are con long ws enot N	DIRECT CREDIT AVAILABLE IN BANK ACCOUNT Unitholders having bank account with ABN AMRO Bank, Citi Bank, Deutsche Bank, HDFC Bank, HSBC Bank, ICICI Bank, IDBI Bank, Standard Chartered Bank, Axis Bank, Kotak Mahindra Bank, Yes Bank, State Bank of India, Corporation Bank & Punjab National Bank will receive their Redemption / Dividend Payments (if any) directly into their bank account. The Fund reserves the right to add / delete / modify the list from time to tome. For remittance via Electronic Credit, cancelled copy of cheque is mandatory. The cancelled cheque leaf must be submitted in order to safeguard the interest of the investors.																
First Holder / Authorised Signatory										Į į	In case Unitholders wish to receive a cheque (instead of a direct credit into their bank accorpreference below: [We want to receive the redemption and dividend proceeds (if any) by way of a cheque. [Please tick(]							,,,					
																FOR REDE! my folio an			on procee	eds through	nRTGS.		
Bank Mandate [Please tick(·/)] ☐ As per Account Statement ☐ Changed (See reverse) In case of change in Bank mandate, please also sign on the reverse							[Please tick(✓)] ☐ Yes ☐ No (If Yes, please fill the IFSC Code) IFSC CODE																
Contact Us:																Switch							
1-800-270-7000 connect@birlasunlife.com						Scheme: BSL Amount (Rs.)											or Units						



BANK / CONTACT DETAILS UPDATION FORM (for Retail Investors)

FULIO NUMBER (Mandatory) :	Date: D D M M Y Y											
1st Holder Name 2nd Hol	der Name 3rd Holder Name											
PAN Number KYC Complied PAN Number	KYC Complied PAN Number KYC Complied KYC Complied											
CHANGE / UPDATION OF BANK DETAILS	UPDATION OF CONTACT DETAILS											
Name of the Bank	New Address											
Branch Address	City											
	State Country Pin Code											
City State	(Address change ONLY for non-KYC holders. KYC compliant customers please use separate form. Visit www.birlasunlife.com for details)											
Pin A/c No.	ISD CODE TELEPHONE: OFF. S T D -											
A/c Type : SAVINGS CURRENT NRC NRC NRC NRSR OTHERS	RESI. S T D - MOBILE											
MICR Code : IFSC Code :	ONLINE ACCESS** (this enables you to access your investment portfolio through our website - www.birlasunilife.com)											
This is a 9 digit number next to your Cheque Number. Please attach an extra blank cancelled cheque or a clear photo-copy of a cheque. It is the esponsibility of the Investor to ensure the correctness of the IFSC code of the recipient/destination branch corresponding to the Bank details	I wish to receive the following via e-mail instead of physical document											
DECLARATION(S) & SIGNATURE(S)	☐ Account Statement ☐ Annual Report ☐ Other Statutory Information											
To, The Trustee, Birla Sun Life Mutual Fund Having read and understood the contents of the Offer Document/Statement of Additional Information / Scheme Information Document of the Scheme, I/We hereby apply for units of the scheme and agree to abide by the terms, conditions, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate sources only and does not involve and is not designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other	E-MAIL Important Note: Please ensure that you enter your phone number and email address											
applicable laws enacted by the government of India from time to time. I/We have understood the details of the scheme & I/we have not received nor have been induced by any rebate or glist, directly or indirectly in making this investment. I/We confirm that details provided by me/us are true and correct.	correctly. Here's why: • Keep an eye on your money: We will send you regular updates on your investment status • Early Bird advantage: You'll be the first to know about our new products • Go green: Stay free of paperwork											
First Holder / Authorised Signatory Second Holder Third Holder	√											

It is necessary to mention the Ten-Digit Folio number for the purpose of any transaction. 2. Please strike off the transaction type that are NOT filled by you before submitting the form. 3. To make an additional purchase, please send us a local cheque / DD payable at any of our branch/ authorised centre. Please make the cheque/ DD payable in favour of the respective scheme e.g. Birla Sun Life Advantage Fund, Birla Sun Life Income Plus etc. 4. No stock invest, cash or outstation cheques will be accepted. D.D. charges would be borne by the AMC only for the investors residing at places which are not covered by our offices/authorised centres. The maximum charges so bome by the AMC would be restricted to limits as prescribed by State Bank of India. 5. For fresh purchases under new scheme, plan or option - please effet he respective Offer Document(s). 6. Redemptions/Switches will be processed only if amount/ units is clearly mentioned. If there is no sufficient amount/ units, the balance available free units in the respective account will be redeemed/ shifted/ switched. 7. Bank Mandate & PAN No. Mandatory: In order to protect the interest of investors from fraudulent encashment of cheques, the SEBI Regulations have made it mandatory for investors to mention in their application / Redemption request, the bank name and account number. It is compulsory for all investors to quote their Permanent Account Number (PAN) and submit copy of the PAN card issued by the Income Tax Department, in respective of the amount of investors to guidelines issued by SEBI under Jack, 2002. Multual Funds are required to foliow enhanced know open vanced mandatory over customer (KYC) porms. According to enhanced KYC norms, it is made compulsory for all investors to be KYC compliant while making an application for subscription of units, amounting to Rs. 50,000 and above, w.e.f. February 1, 2008. 9. If the broker details are changed / re-written, please countersign near the broker box for confirmation