

B. POST DATED CHEQUE DETAILS (TO BE FILLED BY INVESTORS WHO WISH TO INVEST THROUGH POST DATED CHEQUES. PLEASE ATTACH THE CHEQUES WITH THIS FORM)

Cheque Dates From DDMMYY To DDMMYY Cheque Nos. From To

Account Type [Please tick (✓)] SAVINGS CURRENT OTHERS _____ (please specify)

Drawn on Bank

Branch Bank A/C No

4. FOR CENTURY SIP (Please read detailed Terms & Conditions for availing CSIP)

Mandatory

Date of Birth DDMMYY Signature of the Life Assured Date DDMMYY

GENDER MALE FEMALE Place

NOMINATION DETAILS (Refer Instruction No. F-14) **Nomination as stated below, shall be considered and prevail over nomination details provided in Common Application Form.**

I/We do hereby nominate the undermentioned Nominee to receive the units to my / our credit in this folio no. in the event of my / our death. I / We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the AMC / Mutual Fund / Trustees.

Nominee Name : _____ Date Of Birth (in case of minor): ____ / ____ / ____

Relationship : _____ Guardian / Parent Name (in case of minor): _____

Address : _____

Witness Name: _____ Address : _____

Signature of Nominee or Parent / Guardian

Signature of the Witness

5. DEMAT ACCOUNT DETAILS (OPTIONAL) (Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c. held with the depository participant.) Refer Instruction No. E (27)

NSDL: Depository Participant Name: _____ DPID No.: I N Beneficiary A/c No.

CDSL: Depository Participant Name: _____ Beneficiary A/c No.

6. DECLARATION(S) & SIGNATURE(S)

I/We hereby authorise Birla Sun Life Mutual Fund and their authorised service provider to debit the above bank account by ECS/ NECS/ RECS/ Auto Debit/PDC Clearing for collection of SIP payments. I/We understand that the information provided by me/us may be shared with third parties for facilitating transaction processing through ECS/ NECS/ RECS/ Auto Debit/PDC Clearing or for compliance with any legal or regulatory requirements. I/We hereby declare that the particulars given above are correct and complete and express my/our willingness to make payments referred above through participation in ECS/ NECS/ RECS/ Auto Debit/ PDC Clearing. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We will not hold BSLAMC/MF or their appointed service providers or representatives responsible.

I/We will also inform, about any changes in my bank account immediately. I/We undertake to keep sufficient funds in the funding account on the date of execution of standing instruction. I/We have read and agreed to the terms and conditions mentioned overleaf.

The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

For Century SIP: I/We hereby opt for Birla Sun Life Century SIP and agree and confirm to have read, understood and accepted the Terms and Conditions of Century SIP and Insurance Cover.

For Micro SIP only: I hereby declare that I do not have any existing Micro SIPs which together with the current application in rolling 12 month period or in financial year i.e. April to March will result in aggregate investments exceeding ₹ 50,000 in a year.

I / we am / are aware and understand that if, at the time of availing the Micro SIP, I / we hold a valid Permanent Account Number (PAN) issued by the Income Tax Department of India, a KYC acknowledgment letter issued by CDSL Ventures Limited would have to be submitted by me / us to MF/AMC. Accordingly I / we understand and agree that I / we shall be responsible for the consequences of non-submission of the same, if any. (refer Instruction no: E-23)

Signature (s) Name of First Unit Holder First Applicant

Name of Second Unit Holder Second Applicant

Name of Third Unit Holder Third Applicant

(To be signed by All Applicants if mode of operation is Joint)

CHECKLIST

| Particulars | Regular SIP | Century SIP (with Life Insurance) | Micro SIP (Upto ₹ 50,000 Investment in a year) |
|--|---|---|---|
| Nomination | Not Required | Mandatory Requirement | Not Required |
| First Purchase through cheque/ DD | Recommended | Mandatory Requirement | Recommended |
| Different amount for first cheque and subsequent installment | Allowed | Not allowed | Allowed |
| Common Application Form | Required only for new Investors | Mandatory Requirement for All Investors | Required only for new Investors |
| Investment tenure | Investor's choice / Default | Tenure = 55years (Less) Current age | Investor's choice / Default |
| PAN and KYC | Mandatory Requirement | Mandatory Requirement | If having a PAN, KYC is mandatory |
| Dates | Max upto 4 dates in a month | Only 1 date per month | Max upto 4 dates in a month |
| Minimum Amount Criteria (For list of eligible schemes please refer the SIP and CSIP instructions.) | Birla Sun Life Tax Relief '96 and Birla Sun life Tax Plan - ₹ 500 / each, Other eligible Schemes- ₹ 1000/ each. | ₹ 1000 per month for all eligible schemes | Birla Sun Life Tax Relief '96 and Birla Sun life Tax Plan - ₹ 500 / each, Other eligible Schemes- ₹ 1000/ each. |
| Application with Minor as first applicant | Allowed | Not allowed | Allowed |

We request you to read Terms and Conditions before availing Century SIP

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) **SYSTEMATIC INVESTMENT THROUGH NECS / DIRECT DEBIT / PDC FACILITY APPLICATION FORM**

Scheme Name _____ Plan _____ Option _____

Sweep To:- Scheme Name _____ Plan _____ Option _____

Amount (₹) _____

- Request for**
- Renewal of SIP
 - Registration of SIP
 - Registration of CSIP
 - Change in Bank Details
 - Additional Micro SIP in same folio