

INSTRUCTIONS

1. Application will not be accepted/ processed unless accompanied with duly signed fresh term sheet.
2. For Individuals Clients: (a) The application should be duly signed by all holders as per the existing portfolio. (b) The holding pattern of investments in the new portfolio will be as per the existing investment's holding pattern. (c) No change /addition or deletion of names will be allowed in the pattern of investments. (d) If there is any change / addition/ deletion in the holding pattern of the investments, the clients will need to resubmit a fresh application with all the supporting documents.
3. In case of HUF Clients: (a) The Karta will sign on behalf of the HUF. (b) Please affix the rubber stamp of the HUF.
4. In case of Partnership Firm (a) the form should be signed by all the Partners/Authorised Partner(s). (b) Please affix the rubber stamp of the Partnership firm.
5. In case of Corporates / Societies / Trust: (a) The form should be signed by all the Authorised Signatory(ies). (b) Please affix the rubber stamp of the Corporate / Society / Trust. (c) Certified true copy of the Board / Managing Committee / Trustee resolution authorising the investment in portfolio should be provided in the prescribed format. In case there is change in authorised signatories, details of signatories in the prescribed form should be submitted along with application.

FOR OFFICE USE

RM / Distributor Name

Received on Processed on

Location Received by Processed by

Contact No. Remarks Remarks