COMMON APPLICATION FORM

Birla Sun Life
Mutual Fund

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COMMON APPLICATION FORM

Birla Sun Life
Mutual Fund

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INSTRUCTIONS FOR FILLING APPLICATION FORM

GENERAL INSTRUCTIONS

1.

- Please read the terms of the Key Information Memorandum, the **Statement of Additional Information / Scheme Information Document** and addendum issued from time to time carefully before filling the Application Form. Investors should also appraise themselves of the prevailing Load structure on the date of submitting the Application Form. Investors are deemed to have accepted the terms subject to which this offer is being made and bind themselves to the terms upon signing the Application Form and tendering payment. Application form should be completed in English and in BLOCK LETTERS. Please tick in the appropriate boxes wherever anolicable
- ii) applicable
- The signature should be in English or in any of the Indian languages specified in the eighth schedule of the Constitution of India. Thumb Impressions must be attested by a magistrate or a notary public or a special executive magistrate under his/her official seal. Applications by minors should be signed by the guardians. In case of H. U. F., the Karta should sign on behalf of the H. U. F. iii)
- iv)
- v)
- behalf of the H. U. F. The application complete in all respects along with the cheque / demand draft must be submitted to the nearest designated Investor Service Centre. Applications incomplete in any respect or not accompanied by cheque or demand draft of the amount payable are liable to be rejected and the money paid will be refunded without interest. No receipt will be issued for the application morey. The designated Investors Service Centre will stamp and return the acknowledgment slip in the application form, to acknowledge receipt of the application. All cheques and bank drafts must be drawn in favour of "Scheme Name" and crossed "Account Payee Only". A separate cheque or bank draft must accompany each application (acch Scheme. In case the Scheme name as provided by investor on the application form and on the payment instrument are different, the application shall be processed and units allotted of the Scheme as mentioned in the application Form duly signed by investor. vi)
- The scheme as thermore in the application room oury signed our previous. Investors already holding a folio in Birls Sun Life Mutual Fund can provide their existing Folio Number and Name of applicants(s) corresponding to the said folio. It is the responsibility of the Investor to ensure correctness of such details provided. The personal details and Bank Account details as registered in the existing folio number as provided would apply to the said investment and the registered details would prevail over any conflicting information furnished in this form. The AMC reserves the right to assign any of the existing Folio Number of the investor against multiple applications and / or subsequent purchases under this new application form lodged, with identical mode of holding and address and such other criterions and integrity checks as may be determined by the AMC from time to time. vii)

TRANSACTION CHARGES viii)

TRANSACTION CHARGES SEBI with the intent to enable investment by people with small saving potential and to increase reach of Mutual Fund products in urban areas and in smaller towns, wherein the role of the distributor is considered vital, has allowed AMCs vide its circular No. Cir/IMD/ DF/13/2011 dated August 22, 2011 to deduct transaction charges for subscription of ₹ 10,000/- and above. In accordance with the said circular, if the distributor, through which your application form is being routed, has opted to receive the Transaction Charges, Birla Sun Life Asset Management Co. Ltd. / Birla Sun Life Mutual Fund shall deduct the Transaction Charge of ₹ 150/- (for First Time Mutual Fund Investor) or ₹ 100/- (for Investor other than First Time Mutual Fund Investor) from your subscription amount and pay the same to such distributor. Thereafter, the units shall be allotted against the balance amount invested after deduction of Transaction charges payable to the distributor. The statement of account shall clearly state the net investment as mount. Please note that Transaction Charges shall not be deducted in the following cases: a. ourchases / subscription for an amount less than ₹ 10.000/:

Please note that Transaction Charges shall not be deducted in the following cases: a. purchases / subscriptions for an amount less than ₹ 10,000/-; b. Transaction other than purchases / subscriptions relating to new inflows such as Switches / STPs / Dividend Sweep etc. c. Purchases / subscriptions made directly with the Mutual Fund (i.e. not routed through any distributor / agent). In case of investments through Systematic Investment Plan (SIP): Transaction charges in case of investments through Systematic Investment Plan (SIP) shall be deducted only if the total commitment (i.e. amount per SIP installments. Investor should note that, as per SEBI circular no. SEBI/IMD/CIR No. 4/ 168230/09, dated June 30, 2009, the upfront commission, if any, on investment made by the investor shall continue to be paid by the investor directly to the Distributor by a separate cheque, based on his assessment of various factors including the service rendered by the Distributor.

INVESTOR PARTICULARS

- STOR PARTICULARS
 Name and address must be given in full. P.O. Box address is not sufficient. In case of NRIs/ FII investors an overseas
 address must be provided.
 "On behalf of Minor" Accounts: Name of Guardian must be mentioned if investments are being made on behalf of a
 minor. Date of birth is mandatory in case of minor. The the the first and the sole holder in the account
 (folio) No joint holder will be allowed in an account (folio) where minor shall be the first and the sole holder in the account
 (folio) on behalf of the minor should either be a natural guardian (i.e. father or mother) or a court appointed
 legal guardian and the same must be mentioned in the space provided in application form. Copy of document
 evidencing the date of birth of the minor and relationship of the guardian with the minor (whether natural or legal
 guardian) should mandatorily be provided while opening of the account (folio). Also, nomination should be allowed in a diolexount teld on behalf of a minor.
 In case of an application under Power of attorney or by a limited company, body corporate, registered society, trust or
 partnership, etc the relevant Power of attorney or by a limited company, body corporate, registered society, trust or
 with the application form. ii)
- iii) with the application form.
- Documentation to be submitted by Corporate Investors/Societies / Trusts /Partnership Firms/ FIIs iv)

	Corporate Investors	Trusts	Societies	Partnership Firms	Flls	POA
Board/ Committee Resolution/ Authority Letter	1	1	1	1	1	
Memorandum & Articles of Association	1					
Trust Deed		1				
Partnership Deed				1		
Bye-laws			1			
List of authorised Signatories with name, designation & Specimen Signature	1	1	1	1	1	
Overseas Auditor's certificate					~	
Power of Attorney						1

Lower of Attomey The Power of Attomey and the standard set of the set of the

- eritity, as applicable. Applicants can specify the mode of holding in the application form as "Single" or "Joint" or "Anyone or Survivor". In the case of holding specified as "Joint", redemption and all other request / transactions would have to be signed by all unit holders. However, in cases of holding specified as "Anyone or Survivor", any one of the unit holders will have the power to make all necessary requests, without it being necessary for all the unit holders to sign. In the event the account has more than one registered unit holders and the mode of holding is not specified in the application form, the default option for holding would be considered to be "anyone or survivor". However, in all cases, the proceeds of all dividend/redemption will be paid to the firstnamed holder. All communications will also be sent to the first named holder.
- vi)
- Instantation to the structure indicate their preference of Plan/option on the application form. If no plan is selected in the application form, the investment will be deemed to be for the default option. QUALIFIED FOREIGN INVESTOR (QFI): Qualified Foreign Investor (QFI) can invest in the scheme(s) provided the same is in compliance with SEBI circular CIR / IMD / DF / 14 / 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / FI & 2011 dated August 9, 2011 read with SEBI circular CIR / IMD / vii)

3(A). BANK AND PERMANENT ACCOUNT NUMBER DETAILS

Bank Details: 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.

made it mandatory for investors to mention in their application/ Redemption request, the bank name and account number. PAN Details: 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, irrespective of the amount of investment, while making an application for Purchase of Units. In case of joint applicants, PAN details of all holders should be submitted. In case the investor making the application is a minor, PAN details of the Guardian must be submitted. Investors residing in the state of Sikkim are exempt from the mandatory requirement of PAN proof submission, however sufficient documentary evidence shall have to be submitted to Binka Sun Life Mutual Fund for verifying that they are residents of State of Sikkim. Investors (being individuals) applying for Micro SIP registrations are exempt from mandatory requirement of PAN submission.For further details on Micro SIP, documents required top leaves the submitted. Investors (being individuals) applying for Micro SIP. DEMATACCOUNT DETAILS: Option to hold Units in dematerialized (demat) form DEMATACCOUNT DETAILS: Option to hold Units in dematerialized (demat) form

Pursuant to SEBI Circular no. CIRIMD/DF/9/2011 dated May 19, 2011, effective October 01, 2011, Investors have an option to subscribe to/hold units of Scheme(s)/Plan(s) viz. open ended, close ended, Interval (except for exchange traded fund(s) in dematerialized (demat) form

dematerialized (demai) form. Consequently, the Unitholders under the Scheme(s)/Plan(s) shall have an option to subscribe to/ hold the units in electronic (demat) form in accordance with the provisions laid under the respective Scheme(s)/Plan(s) and in terms of the guidelines/ procedural requirements as laid by the Depositories (NSDL/CDSL) from time to time. Units under Plan(s)/Option(s) of all Schemes of Birla Sun Life Mutual Fund with dividend distribution of daily, weekly or fortnightly frequency, as defined under respective Scheme Information Document, shall be available in physical (non-demat) mode only. Also, various Special Products/Facilities such as Century SIP, Systematic Withdrawal Plan, Systematic Transfer Plan, Switching et c. offered by AMC/Mutual Fund shall be available for unitholders in case the units are held/opted to be held in physical (non-demat) mode.

Investors intending to hold units in electronic (demat) form will be required to have beneficiary account with a Depository Participant (DP) (registered with NSDL / CDSL) and will be required to indicate, in the application form, the DP's name, DP ID

Number and the Beneficiary account number of the applicant held with the DP at the time of subscribing to the units. Applicants Number and the beneficiary account number of the application from with the DP at the time of subschizing to the during account must ensure that the sequence of the names as mentioned in the application form mixels have the beneficiary account held with the DP. Names, PAN details, KYC details etc. mentioned in the Application Form will be verified against the Depository records. If the details mentioned in the application form are found to be incompleted / incorrect or not matching with the depository records, the application shall be treated as application for physical (non-demat) mode and accordingly units will be allotted in physical (non-demat) mode, subject to it being complete in all other aspects. Unitholders who have opted to hold and thereby allotted units in electronic (demat) form will receive payment of redemption / dividend proceeds into bank account linked to their Demat account.

Units held in electronic (demat) form will be transferable subject to the provisions laid under the respective Scheme(s)/Plan(s) and in accordance with provisions of Depositories Act, 1996 and the Securities and Exchange Board of India (Depositories and Participants) Regulations, 1996 as may be amended from time to time.

Participants) regulations, response to hold the Units in a Dematerialized /Rematerialized form at a later date, the request for conversion of units held in physical (non-demat) mode into electronic (demat) form or vice-versa should be submitted alongwith a Demat/Permat Request Form to their Depository Participant(s). Investors should ensure that the combination of names in the account statements the same as that in the demataccount. KNOW YOUR CUSTOMER (KYC)

4.

KNOW YOUR CUSTOMER (KYC) According to guidelines issued by SEBI under The Prevention of Money Laundering Act, 2002', Mutual Funds are required to follow enhanced know your customer (KYC) norms. Investors can visit branches of BSLAMC or may visit www.birlasunife.com, www.amfindia.com and www.cdslindia.com to know detailed procedure for KYC compliance. Effective January 01, 2011 it is mandatory for all category of investors to be KYC compliant for all investment transactions made on or after January 01, 2011, irrespective of amount of investment. To further clarify, the above category of investors shall include: i. their constituted Power of Attorney (PoA) holder, in case of investments through a PoA ii. Guardin gene of investments in joint names; and iii. Guardin gene of investment is more than the former.

iii. Guardian in case of investments on behalf of minor. Applications without KYC Acknowledgement letter for the specified category of investors are liable to be rejected.

Applications without KYC Acknowledgement letter for the specified category of investors are liable to be rejected. Provided further, where it is not possible to verify the KYC compliance status of the investor at the time of allotment of units, the BSLANC shall verify the KYC compliance status of the investor within a reasonable time after the allotment of units, the transactions or affect mandatory redemption of unit holdings of the investors at the applicable NAV, subject to payment of exit load. Investors should note that on completion of KYC Compliance all details of the investor in the Mutual Fund records will be replaced by the details as given in KYC Application Form by the investor. Any change in these details like change of Name / Address / Status / Signature, etc. should be given by Investor directly in the prescribed manner. Pursuant to SEBI Circular No. MIRSD/ Cir-26/ 2011 dated December 23, 2011, regarding uniformity in the Know Your Customer (KYC) process in the securities market and development of a mechanism for centralization of the KYC process werd. January 01, 2012:

January 01, 2012:

- January 01, 2012: January 01, 2012: I. SEBI has introduced a common KYC Application Form for all the SEBI registered intermediaries viz. Mutual Funds, Portfolio Managers, Depository Participants, Stock Brokers, Venture Capital Funds, Collective Investment Schemes, etc. New Investors are therefore requested to use the common KYC Application Form and carry out the KYC process including In-Person Verification (IPV) with any SEBI registered intermediaries including mutual funds. The KYC Application Forms are also available on our website www.birlasunific.com.
- available on our website www.birlasunlife.com. 2. The Mutual Fund shall perform the initial KYC of its new investors and may undertake enhanced KYC measures commensurate with the risk profile of its investors. The Mutual Fund shall upload the details of the investors on the system of the KYC Registration Agency (KRA). Registrar & Transfer Agent (RTA) of the Mutual Fund may also undertake the KYC of the investors on behalf of the Mutual Fund. KRA shall send a letter to the investor within 10 working days of the receipt of the initial/updated KYC documents from the Mutual Fund, confirming the details thereof. 3. Once the investor has done KYC with a SEBI registered intermediary, the investor need not undergo the same process again with another intermediary including mutual funds. However, the Mutual Fund reserves the right to carry out fresh KYC of the investor.
- investor
- It is mandatory for intermediaries including mutual funds to carry out In-Person Verification (IPV) of its new investors w.e.f. January 01, 2012.

January 01, 2012. The IPV carried out by any SEBI registered intermediary can be relied upon by the Mutual Fund. BSLAMC and NISM/AMFI certified distributors who are KYD compliant are authorized to undertake the IPV for Mutual Fund investors. Further, in case of any applications received directly (i.e. without being routed through the distributors) from the investors, the Mutual Fund may rely upon the IPV (on the KYC Application Form) performed by the scheduled commercial banks. Existing KYC compliant investors of the Mutual Fund can continue to invest as per the current practice. However, existing investors are also urged to comply with the new KYC requirements including IPV as mandated by SEBI.

5. MODE OF PAYMENT

- ECP PAYMENT Resident investors may make payment by cheque payable locally in the city where the application form is submitted at the local Birla Sun Life Asset Management Company Ltd. (BSLANC) Offices / Authorised Collection Centres. The cheque should be drawn on any bank which is situated at and is a member/sub member of the bankers clearing house or the cheque should be drawn on Bank branch which is participating in "Speed Clearing' facility made available by Reserve Bank of India (RBI) [i.e. if the presenting bank branch and location is appearing in list of "Speed Clearing' locations as prescribed by RBI from time to time for Core Banking Solution (CBS) branches]. Investors are requested to note that only cheques of value of upto ₹ 1 lacs shall be accepted under this "Speed Clearing" facility. Further, the list of Speed Clearing-enabled bank branches are hosted on the website of the RBI under the link http://www.thi.org/in/Script/Sts__viewcontent.aspX1e2_016.
 Payment through Stock invest, outstation cheques and third party payments will not be accepted.
 For all mode of payments, details of source account, source bank name and source branch name should be mentioned.
 Restriction on acceentance of Third Party Payment: ii)
- iv) v)
- For all mode of payments, details of source account, source bank name and source branch name should be mentioned.
 Restriction on acceptance of Third Party Payment:

 Pursuant to the AMFI Best Practice Guidelines circular on 'Risk mitigation process against Third-Party Cheques in mutual fund subscriptions' read with compliance with 'Know your Customer (KYCY) norms under Prevention of Money Laundering Act, 2002 (PMLA), Birla Sun Life Asset Management Company Limited (BSLAMC)' Birla Sun Life Mutual Erund (BSLMF) shall not accept applications for subscriptions of units accompanied with Third Party Payments, except in the cases as enumerated below in para (c).
 b) "Third Party Payment" means payment through an instrument issued from a bank account other than that of the beneficiary investor. In case of payments from a joint bank account, the first named investor/holder of the mutual fund fold RSLMF shall not acceeding view which payment is made.
 C) BSLAMC shall not acceed subscriptions accompanied with Third Party Payments except in the following exceptional situations subject to submission of requisite documentation/declarations enumerated in para (d) below:
 i. Payment by Parents/Grand-Parents/Related persons on behalf of a minor in consideration of natural lowe and affection or as gift for a value not exceeding view (2006) (each regular purchase or per SIP installment) However, this restriction will not be applicable for payment made by a guardian whose name is registered in the records of Mutual Fund in that folia sa guardian.
 ii. Payment by Employer on behalf of employee under Systematic Investment Plans (SIP) through Payroll

 - Payment by Employer on behalf of employee under Systematic Investment Plans (SIP) through Payroll ii. deductions iii. Custodian on behalf of an FII or a client.
 - In case of exceptional situations' mentioned above, investors are required to submit following documents/declarations alongwith the application form without which such applications will be rejected/not processed/refunded: d)

 - Windiatory KYC for all Investors (guardian in case of minor) and the person making the payment i.e. third party. In order for an application to be considered as valid, investors and the person making the payment should attach their valid KYC Acknowledgement Letter to the application form. A separate, complete and valid 'Third Party Payment Declaration Form', inter alia, containing the details of the bank account from which the payment is made and the relationship with the investor(s). The declaration has to be given by the person making the payment is. Third Party, Plases contact the nearest Investor Service Centre (ISC) of BSLAMC or visit our website www.birlas.unlife.com for the said Declaration Form. ii.
 - BSLAMC/BSLMF shall verify the source of funds to ensure that funds have come from the drawer's account only Investors are requested to note that, in case of:
 - Payment by Cheque: An investor at the time of his/her purchase must provide the details of his pay-in bank account (i.e. account from which a subscription payment is made) and his pay-out bank account (i.e. account into which redemption/dividend proceeds are to be paid). If the name/bank account number is not pre-printed on the cheque and signature on the cheque does not match with signature on the application, then the first named applicant/investor should submit any one of the following documents:
 - a.
 - sucant/investor should submit any one of the following documents: a copy# of the bank passbook or a statement of bank account having the name and address of the account holder and account number; a letter' (in original) from the bank on its letterhead certifying that the investor maintains an account with the bank, along with information like bank account number, bank branch, account type, the MICR code of the branch & IFSC Code (where available). b.
 - branch & IFSC Code (where available). If Investors should also bring the original documents along with the documents mentioned in (a) above to the ISCs/Official Points of Acceptance of BSLMF. The copy of such documents will be verified with the original documents to the satisfaction of the BSLANC/BSLMF. The original documents will be returned across the counter to the investor after due verification. * In respect of (b) above, it should be certified by the bank manager with his/her full signature, name, employee code, bank seal and contact number.

 - code, bank seal and contact number. Investors should note that where the bank account numbers have changed on account of the implementation of core banking system at their banks, any related communication from the bank towards a change in bank account number should accompany the application form for subscription of units. **Payment by Prefunded Instrument:** (1) If the subscription of units. **Payment by Prefunded Instrument:** (1) If the subscription of units. Payment by **Prefunded Instrument:** (1) If the subscription of units. Payment by **Prefunded Instrument:** (1) If the subscription of units. Payment by **Prefunded Instrument:** (1) If the subscription of units. The purchase application, stating the Account holder's name and the Account number which has been debited for issue of the instrument. The account number mentioned in the Certificate should be a registered bank account the first named unitholder should be one of the account holder's name and the Account debited for issue of such instruments. Investors may also submit a copy of the acknowledgement from the bank, wherein the instructions to debit carry the bank account details and name of the investors as an account holder, or a copy of the passbowlbank statement evidencing the debit for issues of a DD, provided bank account rumber has to match with the details provided in the application form and name should match with the name of the first named unitholder. (2) A nre-finded instrument issues the the Ank ananist Casched for investments of 50 0000- or ii.

(2) A pre-funded instrument issued by the Bank against Cash shall not be accepted for investments of ₹50,000- or more. This also should be accompanied by a certificate from the banker giving name, address and PAN (if

available) of the person who has requested for the payment instrument. The name mentioned on the Certificate should match with the name of the first named unitholder and certificate must state such investor's bank account number and PAN as per bank necord, if available. The Certificate(s) mentioned in (1) and (2) above should be duly certified by the bank manager with his/her full signature, name, employee code, bank seal and contact number. Payment by RTGS, NETF, CS, NECS, Bank transfer, etc: A copy of the instruction to the bank stating the account number debited must accompany the purchase application. The account number mentioned on the transfer Instruction copy should be ar egistered bank account or the first named unitholder should be one of the account holders to the bank account or the first named unitholder should be one of the account holders to the bank account or the first named unitholder should be one of the account holders to the bank account or the bank account or the bank account bank account or the first named unitholder should be and bank the account holders bank account or the bank account bank account or the bank account bank account or the first named unitholder should be and bank bank the bank account bank account bank account or the first named unitholder should be account bank bank account baccount bank account bank a iii

- Cash acceptance towards subscription In accordance with SEBI circular CIR/IMD/DF/10/2014 dated May 22, 2014, Investors who are KRA-KYC In accordance with SEBI circular CIR/IMD/DF/10/2014 dated May 22, 2014, Investors who are KRA-KYC compliant and on otbelong to the top 15 cities" may avail of facility of subscribing to units of the Scheme through cash to the extent of \$ 50,000⁻ per investor per financial year. However, repayments in form of redemptions, dividend, etc. with respect to investments through cash, shall be paid only through banking channel. Currently, cash shall be accepted at designated Investor Services Centers of Computer Age Management Services PVL Ltd (CAMS) in Guntur, Bhagalpur, Palanpur, Satara, Sangli, Bhatinda, Kota, Namakkal, Bareilly and Haldia. For detailed Address of Investor Services Centers of CAMS, refer og no 8. Also, for the detailed procedures for making cash applications, Investors may enquire at the said designated ISCs for further assistance. Top Is cities mean top 15 cities based on Association of Mutual Funds in India (AMFI) data on 'AUM by Geograph - Consolidated Data for Mutual Fund Industry' as at the end of the previous financial In case the application for subscription does not comply with the above provisions, BSLAMC/BSLMF retains the Sole and absolute discretion to reject/not process such application and refund the subscription money and shall not be liable for any such rejection.
- Investors residing in Centres, where the Investors service Centres of the mutual fund are not located, are requested to make payment by demand drafts payable at the Centre where the application is to be lodged. D.D. charges are und only for the investors residing at places which are not covered by our offices / authorised centres & DO Charges are mentioned in the form. The maximum charges so borne by the fund would be restricted to limits as prescribed by State Bank of Lodge. vi ofIndia

NRI INVESTORS

RESTRICTION ON NON-ACCEPTANCE OF SUBSCRIPTIONS FROM U.S. PERSONS AND RESIDENTS OF CANADA:

HESTINCTION ON NON-ACCEPTANCE OF SUBSCRIPTIONS FHOM 0.5. PERSONS AND RESIDENTS OF CANADA: As per the requirements of the U.S. Securities and Exchange Commission (SEC), persons falling within the definition of the term "U.S. Person" under the US Securities Act of 1933 and corporations or other entities organized under the laws of U.S. are not permitted to make investments in securities not registered under the Securities Act of 1933. (The term "US Person" means any person that is a United States person within the meaning of Regulation S under the United States Securities Act of 1933 or as defined by the U.S. Commodity Futures Trading Commission or as per such further amended definitions, interpretations, legislation, rules etc, as may be in force from time to time].

legislation, rules etc. as may be in force from time to time]. Further, as per the Canadian Securities Administrator (°CSA') and other applicable laws, prior registration of a scheme is mandatory with CSA before its marketing or selling to the Residents of Canada. The Schemes of Birla Sun Life Mutual Fund ('the Mutual Fund') are presently not registered under the relevant laws, as applicable in the territorial jurisdiction of US. or in any provincial or territorial jurisdiction of Canada. In view of the above, w.e.f August 19, 2014 ('the effective date'), the Trustee to Birla Sun Life Mutual Fund has decided to restrict investments from U.S. Persons, corporations or other entities organized under the law of the U.S. and Residents of Canada as defined under the applicable laws of Canada in the Schemes of the Mutual Fund. Accordinely, the U.B. Decome and Pacidator of Canada concentration for the tot the feature.

- Accordingly, the U.S. Persons and Residents of Canada are requested to note the following: No fresh purchases (including purchases by way of Systematic Investment Plans, Systematic Transfer Plans and Dividend Transfer Plans)/additional purchases/witches in any Schemes of the Mutual Fund is allowed. However, existing investment prior to the effective date in the schemes are allowed to be continued until same are redeemed by such investors;
- If an existing of Intholder(s) subsequently becomes a U.S. Person or Resident of Canada, then such Unit Holder(s) will not be allowed to purchase any additional Units in any of the Schemes of the Mutual Fund; In case Birla Sun Life Asset Management Company Limited (AMC') / the Mutual Fund subsequently identifies, that the subscription amount has been received from U.S. Person (s) or Resident(s) of Canada after the effective date i.e. August 19, 2014, then the Mutual Fund / AMC at its discretion shall redeem all the units held by such person from the Scheme at applicable Net Areast Holting. Net Asset Value.

Repatriation basis:

Payments by MIIs/FIIs may be made by way of Indian rupee drafts purchased abroad or out of funds held in NRE/FCNR account or by way of cheques drawn on non-resident external accounts payable at par and payable at the cities where the Investor Service Centres are located. In case of Indian rupee drafts purchased and subscriptions through NRIs / FCNR account, an account debit cer tificate from the bank issuing the draft confirming the debit should also be enclosed.

Non Repatriation basis:

NRIs investing on a non repatriable basis may do so by issuing cheques/ demand drafts drawn on Non-Resident Ordinary (NRO) account payable at the cities where the Investor Service Centres are located. NOMINATION

- Unit holder can nominate (in the manner prescribed under the SEBI Regulations), maximum upto 3 person(s) in whom the Units hold by him/her shall vest in the event of his/her death. It shall be mandatory to indicate clearly the percentage of allocation / share in favour of each of the nominees against their name and such allocation / share should be in whole numbers without any decimals making a total of 100 percent. In the event of the Unitholders not indicating the percentage of allocation / share for each of the nominees, the AMCs, by invoking default option shall settle the claim equally amongst all the nominees.
- Nomination made by unitholder shall be applicable for investments in all the Schemes in the folio or account and every new nomination for a folio or account will overwrite the existing nomination. Thus, a new nomination request will imply simultaneous cancellation of existing nomination and request for fresh nomination. ii)
- Simulations call be leaded to be shared and request of the seminational other own behalf singly or jointly in favour of one or more persons. Non-individuals applying society, trust, body corporate, partnership firm, Karta of Hindu Undivided Family, holder of Power of Attorney cannot nominate. Nomination form cannot be signed by Power of attorney (PoA) holders. iii)
- In case a folio has joint holders, all joint holders should sign the request for nomination / cancellation of nomination, even if iv) the mode of holding is not "joint"
- The mode of notangishol joint . A minor can be norminated and in that event, the name and address of the guardian of the minor nominee shall be provided by the unit holder. The Applicant is advised that, in case of Single Holding, the Guardian to a Minor Nominee should be a person other than the Applicant. Nomination can also be in tavour of the Central Government, State Government, a local authority, any person designated by virtue of these offices or a religious or charitable trust. v)
- vi)
- The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family or a Power of Attorney holder. A non-resident Indian can be a Nominee subject to the exchange controls in force, from time to time. vii)
- viii)
- Nomination in respect of the units stands rescinded upon the transfer of units. ix)
- Transfer of units in favour of a Nominee shall be valid discharge by the AMC against the legal heir. The cancellation of nomination can be made only by those individuals who hold units on their own behalf single or jointly and x) xi) who made the original nomination.
- On cancellation of the nomination, the nomination shall stand rescinded and the AMC shall not be under any obligation to transfer the units in favour of the Nominee. The nomination details as registered with the Depository Participant shall be applicable to unitholders who have opted to hold units in Dematmode. xii)
- xiii)
- hold units in Demat mode. xiv) Nomination shall be mandatory for new folios/accounts opened by individuals especially with sole/single holding and no new folios/accounts for individuals in single holding shall be opened without nomination. However, in case investors do not wish to nominate must sign separately confirming their non-intention to nominate, failing which the form may be rejected at the discretion of the AMC/Mutual Fund. ELECTRONIC PAYOUT OF REDEMPTION/DIVIDEND

BSLAMC will endeavor to credit the redemption/dividend payouts directly to the designated Bank A/c of the unitholders of Birla. Sun Life Mutual Fund schemes through any of the available electronic mode (i.e. RTGS/ NEFT/ Direct Credit/ NECS/ ECS). BSLAMC reserves the right to use any of the above mode of payment as deemed appropriate for all folios where the required information is available. The Mutual Fund, however, reserves the right to issue a cheque / demand draft inspite of an investor opting for Electronic Payout. DIRECT APPLICATIONS AND EUIN

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- RECT APPLICATIONS AND EUIN Investment in Direct Plan: Investors applying under Direct Plan, are advised to write the word 'DIRECT' in the column 'ARN No' or Broker Code' in their applications for purchases/additional purchases/switches in all such cases where applications are not routed through any distributor/agent/broker. In cases where unit holder uses a pre-printed transaction slip/application form where details in the 'ARN No' Broker Code' column is already printed, unit holder should cancel the ARN No/ Broker Code, write 'DIRECT' in the said column. Also, in case ARN No/ Broker Code is mentioned in the application form, but' "Direct Plan" is indicated, the ARN No/ Broker Code will be ignored and the application will be processed under Direct Plan, subject to it being complete in all other aspects. Further, where application is received for Regular Plan without Distributor code or "Direct" mentioned in the ARN KO Column, the application will be processed under Direct Plan.
- Distributor code or "Direct" mentioned in the ARN Column, the application will be processed under Direct Plan. b. Employee Unique Identification Number (EUIN) is a unique number allotted to Sales personnel i.e. employee/ relationship manager/ sales person of the distributor interacting with the investor for the sale of mutual fund products. Such sales personnel associated with Distributor, should also be holding a valid NISM certificate. Thus, in case of applications routed through distributors, in addition to the AMF Registration Number (ARN) of the distributor, Investors are requested to also provide the EUIN of the individual ARN holder or of employee/relationship manager/sale person of the Distributor interacting with the investor. Providing appropriate EUIN in the application/transaction forms would assist in tackling the problem of mis-selling even if the Sales personnel on whose advice the transaction was executed by investor leaves the employment of the distributor or his/her sub broker. If the distributor has not given any advice pertaining to the investorent (i.e. transaction is 'execution only), then the EUIN box may be left blank, but it would be mandatory for the investor to provide confirmation as mentioned in the application form. **E-MAIL COMMUNICATION**

10. F-MAIL COMMUNICATION

Account Statements, Quarterly Newsletter, Annual Reports and Transaction Confirmation can be sent to Unit holders by post / e-mail. Should the Unit holder experience any difficulty in accessing in the electronically delivered documents, the unit holder shall promptly inform the same to the Mutual Fund. It is deemed that the Unit holder is aware of all security risks including possible third party interception of the documents and contents of the documents becoming known to third parties.

11.

- TERMS AND CONDITIONS FOR ON-LINE ACCOUNT ACCESS
 i) User of Customer Identification PIN (CIP) facility in the parlance of Birla Sun Life Asset Management Co Ltd (BSLAMC) means a Unitholder being serviced by BSLAMC.
 - A CIP will enable the user to view the Account Statement on the Birla Sun Life website (www.birlasunlife.com) and other services meniioned herein after. ii)

- The user shall have no objection to BSLAMC verifying the identity before allotting the CIP. The CIP allotted to the user is confidential in nature and the user confirms that he/she will keep the CIP confidential and will not divulge it to anybody else. The user also agrees to take all possible care to prevent discovery of the CIP by any person. The responsibility for misuse of the CIP of the User is solely of the user and BSLAMC shall not be responsible for the use/misuse of the CIP in any manner whatsoever. The User shall inform BSLAMC immediately in case the CIP becomes known to any other person. BSLAMC may in its absolute discretion, issue to the user a new CIP on similar terms and conditions or under such terms and conditions as BSLAMC may deem fit.
- V)
- BSLAMC may deem fit. BSLAMC may deem fit. BSLAMC may deem fit. BSLAMC may deem fit. BSLAMC will take reasonable efforts to keep its website updated so as to provide most current information on the website. The user also recognises that BSLAMC expressly disclaims liability for errors or omissions in the information on the website. The user also recognises that because of communication and other issues, it is possible that the site may not be operating/working on many occasions. The user also agrees that the look and feel of the Web screen and outputs there from may differ based on the nature of the software used by the user to browse the site. The user agrees not only to the terms and conditions here in contained but also the disclaimer and other matters, as may be displayed/posted on the site. BSLAMC may, in the interest of the user request a fax confirmation of the Instructions and any additional information that BSLAMC may require. BSLAMC shall not be bound to act on instructions' requests received until the said fax confirmation and additional information is received from the user. vi)
- vii)
- viii)
- and additional information is received from the user. The user shall be fully liable to BSLAMC for every transaction entered into using the CIP facility, whether with or without the knowledge of the user and consequences thereof. The user shall not use the online services on a PC or other Internet access device which belongs to any other person or which is provided to the user by his/her employer without such person's or, as the case may be, his/her employer's previous written permission. BSLAMC will not be responsible for any harm or loss caused to any person as a result of the user not complying with this condition. The user indemnifies and agrees to keep BSLAMC at all times saved, defended, harmless and indemnified from and against any and all loss, costs, outgoings, expenses, claims, damages or consequences whatsoever that BSLAMC may suffer as a result of the user using any PC or Internet device without the permission of the owner thereof and he/she shall be bound to compensate. BSLAMC shall not be liable for the non-suitability thereof or it any other data or software contained in such PC or Internet access device through which the online services are accessed by the user is damaged or lost in any manner whatsoever. ix) damaged or lost in any manner whatsoever.
- damaged or lost in any manner whatsoever. The user is aware of all security risks including possible third party interception of his/her account and the content of his/her account becoming known to third parties. The user accepts that the use of online services is not a secure method of viewing, accepting and transmitting information and that it involves security hazards and the risk of any loss of information or obtaining of information by any third party will be to his/her account and BSLAMC shall, in no way, be held responsible for the same and this shall not be considered as a breach of its or its constituent company user confidentiality. The user agrees that the use and storage of any information including without limitation, the CIP, account information, transaction activity, account balances and any other information available on the user personal computer is at his/her own risk and is his/her sole responsibility.
- xi)
- xii) xiii)
- xiv)
- risk and is his/her sole responsibility. The user shall not interfere with, alter, amend, tamper with or misuse in any manner whatsoever the Online Services and in the event of any damage due to improper or fraudulent use by the user, he / shall be liable in damages to BSLAMC. In case of any discrepancy in the details of any transaction carried out in respect of the user's Account, the user shall be obliged to intimate BSLAMC thereof in writing within 10 (ten) days of receipt of the Statement of Account, the user shall be obliged to intimate BSLAMC thereof in writing within 10 (ten) days of receipt of the Statement of Account, the user shall be BSLAMC is authorized to provide any information or details relating to the user or his/her account to any third person so far as is necessary to give effect to any instructions or to comply with any order of Court or of any competent/ statutory authority or as is required under applicable law. The user hereby acknowledges that he/she is utilizing this facility at his/her own risk. These risks would, among others, include the following: XV)

 - include the following: a) Misuse of Password: The user acknowledges that if any third person obtains access to his/her password such third person would be able to provide transaction request to BSLANC. The user shall ensure that the terms and conditions applicable to the use of the password as contained herein are complied with at all times. b) Internet Frauds: The Internet per se is susceptible to a number of frauds, misuse, hacking and other actions, which could affect Instructions to BSLANC. Whilst BSLANC shall aim to provide security to prevent the same, there cannot be any guarantee from such Internet frauds, hacking and other actions, which could affect Instructions to BSLANC. The user shall separately evaluate all risks arising out of the same. The toehealow for conciling the participe of dard by BSLANC could be offected by using are there molicing, destructions, destructions, destructions, and the same.
 - smail separately evaluate all risks ansing out of the same. c) The technology for enabling the services offered by BSLAMC could be affected by virus or other malicious, destructive or corrupting code, programme or macro. This could result in delays in the processing of Instructions or failure in the processing of instructions and other such failures and inabilities. The user understands that BSLAMC disclaims all and any liability, whether direct or indirect, whether arising out of loss of profit or otherwise arising out of any failure or inability by BSLAMC to honour any user instruction for whatsoever reason. The user understands and accepts that BSLAMC shall not be responsible for any of the aforesial risks. The user also accepts that BSLAMC shall disclaim all liability in respect of the said risks.
- The user acknowledges having read and understood the Terms and Conditions relating to opening of an account and various services. The user accepts and agrees to be bound by the said Terms and Conditions including those excluding BSLAMC's liability. xvi)

- SLAMC's liability.
 The user accepts and agrees to be bound by the said Terms and Conditions including those excluding BSLAMC's liability.
 The user understands that BSLAMC may, at its absolute discretion, alter, suspend or terminate any of the services completely or partially without any notice to the Unitholder and without assigning any reasons thereof.
 The user agrees that at present online services are offered as a privilege services to the users without any charge. However, BSLAMC may levy any service charges as applicable from time to time in consideration for the services provided herein. However users not consenting to the charge then, may opt out of the CIP facility.
 SISLAMC reserves the exclusive right to amend the terms and conditions will apply to the user.
 In consideration of BSLAMC providing the user with the online services, successors and assigns from and against all actions, claims, demands, proceedings, loss, damages, costs, charges and espices whatoever which BSLAMC or its constituent companies, their officers, employees, successors and assigns from and against all actions, claims, demands, proceedings, loss, damages, costs, charges and expenses whatoever which BSLAMC or its constituent companies may at any time incur, sustain, suffer or be put to as a consequence of or arising out of the user' use of the said online services.
 the user hereby indemnifies and agrees to keen BSLAMC second defended to be the user'.
- The said online services. The user hereby indemnifies and agrees to keep BSLAMC saved, defended, harmless and indemnified for all liabilities, losses, damages and expenses which BSLAMC may sustain or incur either directly or indirectly as a result of : a) llegal, unauthorized, fraudulent usage or misuse of the user's CIP to access BSLAMC's Website; all requests carrying the user's CIP as evidenced by electronic records available at BSLAMC will be the user's sole responsibility b) Non-compliance of the terms and conditions relating to online services on BSLAMC's website. xxi)

xxii) The Courts in Mumbai alone shall have jurisdiction over all disputes arising out of or in respect of this arrangement.

DIVIDEND SWEEP FACILITY 12.

- (i)
- IDEND SWEEP FACILITY For equity Schemes: Under Dividend Sweep Facility the unitholders can opt for switching the dividend earned under any of the Open-ended Scheme into any other Open-ended Equity Scheme or into the any of the following Open ended schemes of Birla Sun Life Mutual Fund viz., Birla Sun Life Savings Fund, Birla Sun Life Birla Sun Life Government Securities Fund, Birla Sun Life Dynamic Bond Fund, Birla Sun Life Mutual Fund in Sun Life Government Securities Fund, Birla Sun Life Dynamic Bond Fund, Birla Sun Life Mutual Fund in Sun Life Morthly Income, Birla Sun Life MIP, Birla Sun Life MPI for Birla Sun Life Schot Term Opportunities Fund. For debt Schemes: Under Dividend Sweep Facility the unitholders can opt for switching the dividend earn under open ended debt schemes into any other equity or balanced scheme of Birla Sun Life Mutual Fund. For schemes providing sweep facility please refer the table below. In case the investor fails to specify his preference of Option/Facility for Balanced Scheme into which the dividend has to be sweeped, Growth option under the respective Open ended Equity or Balanced Scheme, as applicable, shall be the default option and the application form shall be processed accordingly. For sweep facility under equity or debt schemes, in case the investor fails to specify his preference of Option/Facility for the scheme into which the dividend has to be sweeped, Growth option under the respective Open ended Equity or Balanced Scheme, as applicable, shall be the default option and the application form shall be processed accordingly. Further, the dividend (net of applicable TDS, if any) shall be switched subject to minimum investiment eligibility requirements of the Opted Scheme at applicable NAV based prices (ex-dividend NAV), if the opted Scheme has a record date on the date of exercise of sweep facility. This facility shall be processed on the record date of the dividend decared under the Scheme. Further this facility shall not allow for switch of partial divid (ii)
- multiple schemes. For Monthly Dividend Sweep option for Birla Sun Life Dynamic Bond Fund: Under this option the Unitholders can opt for switching the dividend earned under the Scheme into any other Open-ended Equity Scheme or Balanced Scheme of Birla Sun Life Mutual Fund as opted by the Unitholder. The dividend (net of applicable TDS, if any) shall be switched subject to minimum investment/sweep amount of Rs. 1000 or the minimum investment eligibility criteria of the scheme into which the dividend is sweeped in, whichever is higher, at applicable NAV based prices plus applicable load, (exdividend NAV, if the opted Scheme has a record date on the date of exercise of sweep option). (iii)

RTGS/NEFT

Funds Transfer shall be effected only if the recipient/destination Bank/Branch is participating in RTGS/NEFT.

Funds training statute encode of the Investor to ensure the correctness of the message especially the IFSC code of the recipient / destination branch & account number. The collecting bank as well as BSLMF will get valid discharge if the amount is credited to the account number mentioned in the Application even if the name of the Investor account holder differs. BSLMF shall not assume any liability or responsibility arising out of or made liable for any incorrect request or message. If the date of payment happens to be a holiday at the centre where the recipient branch is situated, the credit will be passed on to the Investor on next working day. BSLMF shall not be liable for delay in payments to the Investor if:

BSLMF shall not be liable for delay in payments to the Investori f: a. Incorrect and insufficient details are provided. b. If there is dislocation of work due to circumstances beyond the control of Remitting/Destination Banks including but not limited to circumstances like non-functioning of computer system, disruption of work due to natural calamities, strike, riot etc or Netware or internet problem or other causes beyond the control of Branch/ bank resulting in disruption of communication, such cases will be settled on the next working day when RTGS/NEFT is functioning properly. The Investor hereby agrees and undertakes that he is aware of all the RTGS/NEFT rules set by RBI & to abide by all the rules, terms, conditions and administrative guidelines issued or which may be issued by the RBI or any other regulatory authorities applicable to the transactions relating to RTGS/NEFT whether directly or/and indirectly. Petalis under FATCA (Forein Laws

Details under FATCA / Foreign laws 14.

Details under FATCA/Foreign laws Tax Regulations require us to collect information about each investor's tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with the relevant tax authority. If you have any questions about your tax residency, please contact your tax advisor. Further if you are a Citizen or resident or green card holder or tax resident other than India, please include all such countries in the tax resident country information field along with your Tax Identification Number or any other relevant reference ID / Number. If there is any change in the information provided, promptly intimate the same to us within 30 days In case 3 (three) consecutive instalments are not honoured/ tailed on account of reasons attributable to the investors like insufficient balance etc. Birla Sun Life Asset Management Company Limited shall discontinue SIP, SWP and STP registrations

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