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1. YOUR P	ERSC	DNA	L DE	TAIL	S (M	ANDA	ORY	) (In	case c	f investn	nent "On	ı behalf	of min	or", Pl	ease r	efer instr	uction	No. 1	1)					
First Applica	nt	Mr.	Ms.	M/s.						F	IRST	APPL		ΙT						Gen	der	Μ	F	0
PAN (Mandatory)										Aadhaa (Optional)	r No.													
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*Email id bel	ongs	to S	elf	/	Fam	nily Mer	nber	(F	efer In	struction	No. 25)													
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BANK ACC	OUN	T DI	TAIL	s fo	R PA	YOUT	(Pleas	e note	that a	s per SEE	31 Regulat	tions it i	s manda	itory fo	or inve	stors to pi	rovide	their b	ank ac	count d	etails. Re	fer Ins	truction N	o. 6)
Name of the	bank																							
Branch Addre	ss																							
City									Stat	e									Pir	ncode				
Account No.																								
Account type		Savir	ngs		Cur	rent		NRE		NRO		FCNR		Oth	ers				S	peci	fy			
IFSC code (11	digit)										MICR	Code (	9 digit)											

Second Appli	cant	Mr.	Ms.	M/s.							SECON	ID A	PPL	CANI	Γ						Ge	ender	\ M	M	F	0
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PAN (Mandatory)											Aadhaar No. (Optional)															
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PAN (Mandatory)											Aadhaar No. (Optional)															
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Others					S	pec	ify																			
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# 2. FATCA AND CRS DETAILS FOR INDIVIDUALS (Including Sole Proprietor. Refer Instruction No. 23)

The below information is required for all applicants/guardian.

	Place / City of Birth	Country of Birth	Country of Citizenship / Nationality
First Applicant / Guardian			Indian U.S. Others
Second Applicant			Indian U.S. Others
Third Applicant			Indian U.S. Others

Are you a tax resident (i.e., are you assessed for tax) in any other country outside India? If 'YES' please fill for ALL countries (other than India) in which you are a Resident for tax purpose i.e. where you are a Citizen / Resident / Green Card Holder / Tax Resident in the respective countries

Yes No

	Country of Tax Residency	Tax Identification Number of Functional Equivalent	or Identification Type (TIN or other please specify)		Add	lress Ty	pe		
First Applicant / Guardian				R	lesi Re	gd. Offi	ce	Bus	iness
Second Applicant				R	lesi Re	gd. Offi	ce	Bus	iness
Third Applicant				R	lesi Re	gd. Offi	ce	Bus	iness
Overseas Address									
				City					
State		Country			Zipcode				

For Non Individual investors Annexure I and Annexure II are available on the website of AMC i.e. www.axismf.com or at the Investor Service Centres (ISCs) of Axis Mutual Fund

3.	NOMINATION DETAILS (Mandatory) (R	efer Instruction No.	18)					
Sr. No.	Nominee Name	PAN	Allocation (%)	Relationship with Investor	Nominee date of birth		<b>Duardian</b> Name ase of Minor)	Guardian Signature
1					D D M M Y Y			
2					D D M M Y Y			
3					D D M M Y Y			
	I/We DO NOT wish to nominate ar	nd sign here	You/ Sole A	Applicant	Second Applica	nt	Third Ap	oplicant

# 4. INVESTMENT DETAILS (For multiple schemes ref instruction no. 22) (Investors applying under Direct Plan must select "DIRECT" against scheme name, Refer Instruction No. 2.)

Sr. No.	Scheme	Plan	Option	Amount
1		Direct Regular		
2		Direct Regular		
3		Direct Regular		
Total	In words			In figures

### **5. PAYMENT DETAILS**

Non-Third Party Payment Third Party Payment (Please attach 'Third Party Payment Decla	aration Form')
Mode     Cheque     DD     Axis Bank Debit Mandate (Please fill section 9.)     Date     D     M     M     Y	Y Y Y Cheque / DD No.
Amount (in figures) (in words)	
Pay-in A/c No.	
Account type Savings Current NRE NRO FCNR Others	Specify
IFSC code (11 digit) MICR Code (9 digit)	
Drawn on bank / branch name & address	

#### 6. 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. 19.

	Depository Participant Name	DP ID: I N
NSDL:	Beneficiary A/c No.	
CDSL:	Depository Participant Name	
CDJL.	Beneficiary A/c No.	
Enclos	ed Client Master	Transaction / Statement Copy / DIS Copy

### 7. DECLARATION AND SIGNATURE

Having read and understood the content of the SID / KIM of the scheme and SAI of the Axis Mutual Fund (The Fund), I/we hereby apply for units of the scheme. I have read and understood the terms, conditions, details, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate source only and does not involve designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directives 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 not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment. I/We confirm that the funds invested in the Scheme, legally belongs to me/us. In event "Know Your Customer" process is not completed by me/us to the satisfaction of the Atte of such redemption and undertake such other action with such funds that may be required by the law.) The ARN holder has disclosed to me/us all the commissions (trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds amongst which the Scheme is being recommended to me/us. I / we give my / our consent to collect personal data or information as prescribed in the privacy policy which is available on the website of the AMC / Fund. I /We give my consent to AMC and its agents to contact me over phone, SMS, email or any other mode to address my investment related queries and/or receive communication performing to transactions/ non-commercial transactions/ potential investments and other communication/ material irrespective of my blocking preferences with the Customer Preference Registration Facility .

I/We confirm that I/We do not have any existing Micro SIP/Lumpsum investments which together with the current application will result in aggregate investments exceeding ₹ 50,000 in a year (Applicable for Micro investment only.) with your fund house. For NRIs only - I / We confirm that I am/ we are Non Residents of Indian nationality/origin and that I/We have remitted funds from abroad through approved banking channels or from funds in my/ our Non Resident External / Non Resident Ordinary / FCNR account. I/We confirm that details provided by me/us are true and correct.

CERTIFICATION: I / We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I / We also confirm that I / We have read and understood the FATCA & CRS Terms and Conditions below and hereby accept the same.

AADHAAR DECLARATION: I/ We hereby provide my/our consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (ii) updating my/ our Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA. I/ We hereby provide my/our consent for sharing/disclosing of the Aadhaar number(s) including demographic information with the asset management companies of SEBI registered mutual fund (s) and their Registrar and Transfer Agent (RTA) for the purpose of updating the same in my/our folios with my PAN.

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
		-	
Date D D M M Y Y Y	Place		

SIP Scheme 3



for first	time inv		SIS rs, sub				_	_							n.			A	plic	atio	n N	<b>1</b> 0.								)
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rela	Ve hereby itionship ployee/re	manc	iger/sal	es pe	erson	n of	the c	above	e dis	stribu	tor/s	sub br	oker d	<sup>/</sup> us as or not	this tr withs	ansac tandir	tion is	exed ad	uted vice	withc of in	out a i-ap	ny ir orop	ntero	actior eness	n or s, if	advid Fany	ce by /, pi	the ovide	emplo ed by	yee/ the
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Yes

No

Stamp & Signature

2. SIP DETAILS				SIP Registration M	lode	A-OTM	K-OTM	Nandate along with SIP form
OTM Reference No.							(if Multiple One Ti	me Mandate are registered)
Scheme / Plan / Option F	requency	SIP Date	Enr	ollment Period		SIP Amount	(Optional) On	P-UP Facility Ily available for Monthly SIP
		(88)		(/****(11)			Frequency	Amount
	Monthly		From		₹	in figures	Half Yearly	₹ in figures
	Yearly	Default SIP Date 7th	То				_ Yearly	in words
			or	1299		in words	_	
			or				D	namic TOP-UP
	Monthly		From		₹	in figures	Half Yearly	₹ in figures
	Yearly		То				_ Yearly	
		SIP Date 7th	L			in words		in words
			or	1299			D	namic TOP-UP
	Monthly		From		₹	in figures	Half Yearly	₹ in figures
	Yearly	Default	то				_ Yearly	
		SIP Date 7th				in words		in words
			or	1299			- D	/namic TOP-UP
SIP initial payment details (Optional)								
Drawn on bank / branch name						Amo	ount	
Mode Cheque/DD Cheque/D	D			Date	ed D	D M M Y	Y Y Y Y	

In case of multiple SIP, mention "Axis MF Multiple Schemes" on the payment instrument.

### 3. Declaration and Signature (to be signed by all unit holders if mode of holding is 'joint')

I / We declare that the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account towards payment of SIP installments and/ or any lumpsum payments through an Electronic Debit arrangement / NACH (National Automated Clearing House) as per my request from time to time. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We would not hold the user institution responsible. I/We will also inform Axis Mutual Fund about any changes in my bank account. I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form. Further, I authorize my representative (the bearer of this request) to get the above Mandate verified. Mandate verification charges, if any, may be charged to my/our account.

You/ Sole Applicant /Guardian

Second Applicant

Third Applicant

# **INSTRUCTIONS FOR SIP & TOP-UP**

- Multiple SIP registration facility is not available for Axis Children's Gift Fund, Axis Liquid Fund, Gold ETF and during NFO. 1.
- 2 3
- Fund, Gold ETF and during NFO. Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 15 days before the first SIP Installment date. Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day.
- 4 Please refer below table for minimum amount per installments:

Scheme	Minimum Amount (₹)	Minimum Installments
All Schemes except Axis Liquid Fund	1000	6
Axis Long Term Equity Fund*	500	6
Note: For all schemes, minimum amount is as pe	r above table and the	ereafter in multiple of

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of ₹500\*.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹1,000/-. 6.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing. The SIP will be discontinued automatically if payment is not received for three successive 7.
- installments. 8
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- received at least 20 acys prior to the due acte of the next installment / debit. Mandate will be processed through NACH platform offered by NPCI. As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following: 10.
  - For Existing / New investors: ₹100 / ₹150 as applicable per subscription of ₹10,000/– and above.
  - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to ₹10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful installments.
  - There shall be no transaction charge on subscription below ₹10,000/-
  - There shall be no transaction charges on direct investments.
  - There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.
  - Transactions carried out through the Stock Exchange platforms for mutual funds shall not be subject to transaction charges.

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

However, the option to charge "transaction charges" is at the discretion of the distributors.

Investors may note that distributors can opt to receive transaction charges based on type of the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable.

- subscription amounts, as applicable. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility. Investor, can change hank details for SIP, by submitting a "CHANGE OF BANK 11.
- Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it. 12.
- TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-13. defined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details
  - The minimum amount for Axis TOP-UP facility is ₹500/- and in multiples of ₹1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹500 and in multiples of ₹500 thereafter.
  - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹ 500/- for all schemes.
  - TOP-UP frequencies available are Half-Yearly/Yearly/Dynamic requested intervals. In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
  - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
  - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6 months from the date of the first installment and minimum gap between two top up requests should be 3 months and amount specified in last request shall be continued till the End of the SIP tenure
  - Please see the illustration below to know how to calculate SIP Top-Up amount: SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹1000

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Ton-Up amount is₹50	0 · Tor	n-Un Frequenc	rv is Half-ver	arlv	

•	Iop-Up amount is < 500 · Iop-Up Frequency is Half-yearly							
	Top-Up date	SIP Amount	Top-Up	New SIP				
		(₹)	Amount (₹)	Amount (₹)				
	7-Nov-2016	1000	500	1500				
	7-May-2017	1500	500	2000				
	7-Nov-2017	2000	500	2500				
	7-May-2018	2500	500	3000				