



**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  D  D  M  M  Y  Y  Y  Y To  D  D  M  M  Y  Y  Y  Y

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**

**DECLARATION OF GOOD HEALTH** (All the fields are mandatory) [Please tick (✓)] **Yes or No – Otherwise The Application Will Be Invalid** (Ref. Instruction No. F-17)

1. Have you ever been treated for symptoms of high blood pressure, diabetes, heart attack or heart disease, stroke, chest pain, kidney disease, AIDS or AIDS related complex, cancer or tumor, asthma or respiratory disease, mental or nervous disease, liver disease, blood disease, digestive and bowel disorder, disorder of the bones, spine or muscle?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2. Have you within the last 2 years taken any form of medication for more than 14 consecutive days to treat an illness or disease?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. Have you within the last 2 years consulted any medical practitioner for any condition other than minor impairment such as cold or flu?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

I understand and agree that the answers to the questions in this Declaration of Good Health are true and complete to the best of my knowledge and belief. I authorize any medical practitioner, hospital, employer, institution or any other person, to disclose to Birla Sun Life Insurance Company Limited any information relating to my health or employment now or at any time in the future. I understand and agree that failure to answer any question in this Declaration truthfully will render the insurance cover invalid and void.

Date of Birth  D  D  M  M  Y  Y  Y  Y

GENDER  MALE  FEMALE

Signature of the Life Assured

Date  D  D  M  M  Y  Y

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)
<b>Declaration of Good Health</b>	Not Applicable	Mandatory Requirement	Not Applicable
<b>Nomination</b>	Not Required	Mandatory Requirement	Not Required
<b>First Purchase through cheque/ DD</b>	Recommended	Mandatory Requirement	Recommended
<b>Different amount for first cheque and subsequent installment</b>	Allowed	Not allowed	Allowed
<b>Common Application Form</b>	Required only for new Investors	Mandatory Requirement for All Investors	Required only for new Investors
<b>Investment tenure</b>	Investor's choice / Default	Tenure = 55years (Less) Current age	Investor's choice / Default
<b>PAN and KYC</b>	Mandatory Requirement	Mandatory Requirement	If having a PAN, KYC is mandatory
<b>Dates</b>	Max upto 4 dates in a month	Only 1 date per month	Max upto 4 dates in a month
<b>Minimum Amount Criteria (For list of eligible schemes please refer the SIP and CSIP instructions.)</b>	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.
<b>Application with Minor as first applicant</b>	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/CSIP

Change in Bank Details

Additional Micro SIP in same folio