

Investment Advisor's Name & Code ARN-56003	Sub-Broker's Code	Systematic Transfer / Withdrawal Form Strike off sections that are not applicable
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Upfront commission shall be paid directly by the investor to the AMFI registered distributors based on the investor's assessment of various factors including the service rendered by the distributor.

Investor's Information

Folio No. <i>(For Existing Investors)</i>	Application No. <i>(For New Investors, Please attach the application form)</i>
Name of Sole/ First Holder	
E-Mail Id <small>Pls. Provide your e-mail id for mailing of account Statement</small>	
<i>I would like to opt for</i> <input type="checkbox"/> Systematic Transfer Plan <input type="checkbox"/> Systematic Withdrawal Plan	
Scheme _____ Plan _____	Option (Please ✓) <input type="checkbox"/> Growth <input type="checkbox"/> Bonus <i>(available only in Kotak Bond Regular)</i> <input type="checkbox"/> Dividend <input checked="" type="checkbox"/> Payout OR <input type="checkbox"/> Re-investment Dividend Frequency _____
Frequency (Please ✓) <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <small>(Available only for STP)</small>	Commencement Date dd/mm/yy
Date <input type="radio"/> 1 st <input type="radio"/> 7 th <input type="radio"/> 14 th <input type="radio"/> 21 st <input type="radio"/> 25 th	Period From mm/yyyy To mm/yyyy

Systematic Transfer Plan (STP)

To Scheme _____ Plan _____	Option (Please ✓) <input type="checkbox"/> Growth <input type="checkbox"/> Bonus <i>(available only in Kotak Bond Regular)</i> <input type="checkbox"/> Dividend <input checked="" type="checkbox"/> Payout OR <input type="checkbox"/> Re-investment Dividend Frequency _____
Transfer Option (Please ✓) <input type="checkbox"/> Fixed Sum Min. Rs. 1000/- OR <input type="checkbox"/> Entire Appreciation	<div style="border: 1px solid red; padding: 5px;"> Check List <ul style="list-style-type: none"> <input type="checkbox"/> Your choice of transfer option is clearly indicated. <input type="checkbox"/> STP period, date & frequency is mentioned above. <input type="checkbox"/> Scheme (Plan) - Option from & to which you wish to transfer is clearly indicated. </div> <div style="border: 1px solid red; padding: 5px; margin-top: 5px;"> Minimum Criteria <ul style="list-style-type: none"> Transfers 6 Amount Rs. 1000/- </div>
PAN # & KYC*	Enclosed (Please ✓)
<small>Sole/ First Holder</small> <input type="radio"/> PAN Proof KYC Compliance Status <input type="checkbox"/> Yes <input type="checkbox"/> No	<small>Second Holder</small> <input type="radio"/> PAN Proof KYC Compliance Status <input type="checkbox"/> Yes <input type="checkbox"/> No
<small>Third Holder</small> <input type="radio"/> PAN Proof KYC Compliance Status <input type="checkbox"/> Yes <input type="checkbox"/> No	<small>(# Please attached PAN card copy) (* KYC Acknowledgement letter copy is Mandatory for investment => Rs. 50,000/-)</small>




Systematic Withdrawal Plan (SWP)

Withdrawal Option (Please ✓) <input type="checkbox"/> Fixed Sum Min. Rs. 1000/- OR <input type="checkbox"/> Entire Appreciation	<div style="border: 1px solid red; padding: 5px;"> Check List <ul style="list-style-type: none"> <input type="checkbox"/> Your choice of withdrawal option is clearly indicated. <input type="checkbox"/> SWP period, date & frequency is mentioned above. </div> <div style="border: 1px solid red; padding: 5px; margin-top: 5px;"> Minimum Criteria <ul style="list-style-type: none"> Withdrawal 6 Amount Rs. 1000/- </div>
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Declaration and Signatures

I/We have read and understood the contents of the SID/ SAI of the above referred Scheme(s) of Kotak Mahindra Mutual Fund. I/We hereby apply for allotment / purchase of Units in the Scheme(s) indicated as above and agree to abide by the terms and conditions applicable there to. I/We hereby declare that I /We authorized to make this investment in the above mentioned Scheme(s) and that the amount invested in the Scheme(s) is through legitimate sources only and is not designed for the purpose of any contravention or evasion of any Act, Rules, Regulations, Notifications or Directions of the provisions of Income Tax Act, Anti Money Laundering Act, Anti Corruption Act or any other applicable laws enacted by the Government of India from time to time. I/We hereby authorize Kotak Mahindra Mutual Fund, its investment Manager and its agents to disclose details of my investment to my / our Investment Advisor and / or banks.

I/We have neither received nor been induced by any rebate or gifts, directly, in making this investment.

SIGNATURE(S)  Sole/Frist Applicant	 Second Applicant	 Third Applicant
To be signed by All Applicants if mode of operation is "Joint"		