

05 MY INVESTMENT DETAILS

(For investments, Please refer instruction No. 1 & 22)

(Cheque/DD should be in favour of "Scheme Name". Default plan/Option will be applied in case of no information, ambiguity or discrepancy). If the investment is in multiple schemes. "The Cheque/ DD should be drawn favouring "Axis MF Multiple Schemes"

Full Scheme/Plan/Option	Amount/Each SIP Amount	SIP Date	Frequency	SIP Period	TOP-UP Facility (Optional) Only available for Monthly SIP	
☐ LUMP SUM ☐ SIP Plan ☐ Regular ☐ Direct Scheme Name Option	₹ Less DD charges	 (If left blank 7 th will be considered as the default date) Any date between 1 st to 28 th	☐ Monthly (default) ☐ Yearly	Start Date End Date OR ☐ Continue Until Cancelled	Frequency ☐ Half Yearly ☐ Yearly	Amount ₹ in figures in words ☐ Dynamic TOP-UP
☐ LUMP SUM ☐ SIP Plan ☐ Regular ☐ Direct Scheme Name Option	₹ Less DD charges	 (If left blank 7 th will be considered as the default date) Any date between 1 st to 28 th	☐ Monthly (default) ☐ Yearly	Start Date End Date OR ☐ Continue Until Cancelled	Frequency ☐ Half Yearly ☐ Yearly	Amount ₹ in figures in words ☐ Dynamic TOP-UP
☐ LUMP SUM ☐ SIP Plan ☐ Regular ☐ Direct Scheme Name Option	₹ Less DD charges	 (If left blank 7 th will be considered as the default date) Any date between 1 st to 28 th	☐ Monthly (default) ☐ Yearly	Start Date End Date OR ☐ Continue Until Cancelled	Frequency ☐ Half Yearly ☐ Yearly	Amount ₹ in figures in words ☐ Dynamic TOP-UP

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.

☐ Payment through NACH (Attach NACH form) ☐ OTM Reference No. (if one time mandate are registered)

OR Documents attached to avoid Third Party Payment Rejection, if applicable: ☐ Bank Certificate, for DD ☐ Third Party Declarations

Payment Details

First Cheque Date Amount Cheque No.

Bank Name Account No.

IFSC Code MICR Code

RTGS/ NEFT/ Funds Transfer

☐ If source of payment bank is same as above bank details tick here.

06 NOMINATION DETAILS

(For nomination, Please refer instruction No. 18)

Details	NOMINEE 1	NOMINEE 2	NOMINEE 3
Nominee Name			
PAN			
Allocation (%)			
Relationship with Investor			
Nominee date of birth			
Guardian Name (in case of Minor)			
Nominee Address			
Nominee/Guardian Signature			

OR ☐ I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

07 DEPOSITORY ACCOUNT DETAILS

(Optional. To be filled if investor wishes to hold the units in Demat mode).

(For DEMAT details Please refer instruction No. 19)

(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.

NSDL:	Depository Participant Name		DP ID:
	Beneficiary Ac No.		
CDSL:	Depository Participant Name		
	Beneficiary Ac No.		
Enclosed ☐ Client Master ☐ Transaction / Statement Copy / DIS Copy			

08



KNOW YOUR CUSTOMER (KYC) DETAILS

(Mandatory. Please Tick/ Specify. The application is liable to get rejected if details not filled.)

(For KYC details. Refer Instruction No. 8)

Tax Status details for	1st Applicant	2nd Applicant	3rd Applicant	Guardian
Resident Individual	☐	☐	☐	☐
NRI/PIO/OCI	☐	☐	☐	☐
Sole Proprietorship	☐	-	-	-
Minor through Guardian	☐	-	-	-
Non Individual	☐ Company	☐ Body Corporate	☐ Partnership	
	☐ Trust	☐ Society	☐ HUF	☐ Bank
	☐ AOP	☐ FI	☐ FII	☐ FPI
Others (Please specify)				

Occupation details for	1st Applicant	2nd Applicant	3rd Applicant	Guardian
Private Sector	☐	☐	☐	☐
Public Sector	☐	☐	☐	☐
Government Service	☐	☐	☐	☐
Business	☐	☐	☐	☐
Professional	☐	☐	☐	☐
Agriculturist	☐	☐	☐	☐
Retired	☐	☐	☐	☐
Housewife	☐	☐	☐	☐
Student	☐	☐	☐	☐
Others (Please specify)				

Politically Exposed Person (PEP) details	Is a PEP	Related to PEP	Not Applicable
1st Applicant	☐	☐	☐
2nd Applicant	☐	☐	☐
3rd Applicant	☐	☐	☐
Guardian	☐	☐	☐
Authorised Signatories	☐	☐	☐
Promoters	☐	☐	☐
Partners	☐	☐	☐
Karta	☐	☐	☐
Whole-time Directors/Turstees	☐	☐	☐

9



ADDITIONAL INFORMATION

(For additional information Please refer instruction No. 8A)

Applicant	KIN No. (If KYC done via CKYC)	Date of Birth*	Gender
First Applicant		D D M M Y Y Y Y	☐ Male ☐ Female
Second Applicant		D D M M Y Y Y Y	☐ Male ☐ Female
Third Applicant		D D M M Y Y Y Y	☐ Male ☐ Female
Guardian or POA^		D D M M Y Y Y Y	☐ Male ☐ Female

*Date of Birth - Mandatory if CKYC ID mentioned. ^G: Guardian; POA: Power Of Attorney

Details	Second Applicant	Third Applicant	G or POA
Mobile No.			
Email Id.			
Relationship with Investor			

I declare that **Email address** provided in this form belongs to (tick any one): ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ PMS and approve for usage of these contact details for any communication with Axis Mutual Fund.

I declare that **Mobile Number** provided in this form belongs to (tick any one): ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ PMS and approve for usage of these contact details for any communication with Axis Mutual Fund.

If above any option is not ticked (✓) or selected then (Self) option is considered as a default.

10



DEBIT MANDATE

(Only for Axis Bank Account holders: Now you don't have to issue a cheque if you hold an Axis Bank Account). To be processed in CMS software under client code "AXISMF"

(For Debit mandate Please refer instruction No. 5 & 22)

I/We	Name of the account holder(s)		APPLICATION NO.
authorise you to debit my/our account no.			
Account type	☐ Savings ☐ NRO ☐ NRE ☐ Current ☐ FCNR ☐ Others	Specify	
to pay for the purchase of	☐ Scheme Name Axis	OR ☐ Axis MF Multiple Schemes	
Amount (in Figures)	(in words)		
Signature of First Account Holder	Signature of Second Account Holder	Signature of Third Account Holder	
Date*	D D M M Y Y Y Y	*Date is mandatory	



ACKNOWLEDGEMENT SLIP

APPLICATION NO.

Received from			
Scheme Name	Plan	Option	
Amount	Cheque/DD No.	Date	D D M M Y Y Y Y
Bank & Branch details			
			Stamp & Signature

Details	Sole/ 1st Applicant	2nd Applicant	3rd Applicant	Guardian/POA
Place & Country of Birth				
Nationality				
Are you a tax resident of any country other than India?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
If Yes: Mandatory to enclose FATCA /CRS Annexure				

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 Mutual Fund, (I/we hereby authorize the Mutual Fund, to redeem the funds invested in the Scheme, in favour of the applicant, at the applicable NAV prevailing on the date 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 hereby give consent to the Company or its Authorized Agents and third party service providers to use information/data provided by me to contact me through any channel of communication including but not limited to email, telephone, sms, etc. and further authorise the disclosure of the information contained herein to its affiliates/group companies or their Authorized Agents or Third Party Service Providers in order to provide information and updates to me on various financial and investment products and offering of other services. I/We agree that all personal or transactional related information collected/provided by me can be shared/transferred and disclosed with the above mentioned parties including with any regulatory, statutory or judicial authorities for compliance with any law or regulation in accordance with privacy policy as available at the website of the Company.

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.

I/ We give my consent to Axis Asset Management Company Limited and its agents to contact me over phone, SMS, email or any other mode to address my investment related queries and/or receive communication pertaining to transactions/ non-commercial transactions/ promotional/ potential investments and other communication/ material irrespective of my blocking preferences with the Customer Preference Registration Facility.

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 (iii) updating my/ our Aadhaar number(s) (if provided) 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.

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.

I/We have read and understood the instructions on nomination given below/overleaf and I/We hereby undertake to abide by the same. The instructions contained herein supercedes all previous nominations made by me/us in respect of the folio(s) mentioned above.

You/ Sole Applicant /Guardian

Second Applicant

Third Applicant

Power of Attorney Holder

Date

Place

- ☐ KYC acknowledgement letter (Compulsory for MICRO Investments)
 ☐ Self attested PAN card copy
 ☐ Plan / Option / Sub Option name mentioned in addition to scheme name
 ☐ Multiple Bank Accounts Registration form (if you want to register multiple bank accounts so that future payments can be made from any of the accounts)
 ☐ Email id and mobile number provided for online transaction facility
 ☐ SIP Registration Form for SIP investments
 ☐ Relationship proof between guardian and minor (if application is in the name of a minor)
 ☐ FATCA Declaration
 ☐ Additional documents attached for Third Party payments. Refer instruction No. 7.

<https://ifaconnect.axismf.com/#/home>

Scan the QR code to download the new AxisMF App

www.axismf.com

<https://www.axismf.com/corporate/Login.aspx>

To stay up to date with your mutual fund investments, connect with us on our WhatsApp number.

 Sent us a 'Hi' on 7506771113 from your registered mobile number to have your queries answered.

[Facebook.com/AxisMutualFund](https://www.facebook.com/AxisMutualFund)

[Twitter.com/AxisMutualFund](https://twitter.com/AxisMutualFund)

[LinkedIn.com/company/Axis-Mutual-Fund](https://www.linkedin.com/company/Axis-Mutual-Fund)

[YouTube.com/AxisMutualFund](https://www.youtube.com/AxisMutualFund)