# COMMON APPLICATION FORM For Resident Indians and NRIs/FIIs



(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM)

Application No.

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TRANSACTION CHARGES FOR APPLICATIONS ROUTED THROUGH DISTRIBUTIONS AGE; TO MAY REFER INSTRUCTION (Will)  Transaction of the charge of the charg	Ref. Instruction No. 9	naid directly by the investor to the	AMEL registered Distributors	hased on the	invectors	2000000	nent of various	factore includi	na the cension	rendered h	v the dietrik	nutor			
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AMRE OF FIRST SOLE APPLICANT Mr. IAb., Ma.  AMRE OF THE SECOND APPLICANT Mr. IAb., Ma.  Applicant  PM Actasszy  Oranghel  Applicant  PM Actasszy  Oranghel  Date of Birth**  Oranghel  Oranghel  PM Actasszy  Oranghel  Date of Birth**  Oranghel  Oranghel  Date of Birth*  Orangh	Mobile No.		Existing Folio No												
AMRIGO FINE SECOND APPLICANT Mr. Mo. Mo.  APPLICANT APPLICANT Mr. Mo. Mo.  EVC Complete  Date of Birth**  Second Applicant  PM discissions  Find Applicant  Deciments  Second Applicant  Deciments  Applicant  Mr. Mo. Mo.  EVC Complete  Date of Birth**  Second Applicant  Date of Birth**  Date of Birth*  Date of Birth**  Date of Birth**  Date of Birth*  Date of B	Email Id														
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Sole / First Applicant	NAME OF THE THIRD APPLICANT	Mr. Ms. M/s.													
Second Applicant	Applicant	PAN (Mandatory)	KYC Complied		Date of E	Birth**									
Third Applicant Guardian POLA Holdor  "Mediadary in case the First / Sole Applicant is Minor MARKE OF THE GUARDIAN (In case First / Sole Applicant is Minor MARKE OF THE GUARDIAN (In case First / Sole Applicant is minor) / CONTACT PERSON - DESIGNATION / PoA HOLDER (In case of Non-individual Investors)  Mr. Mos. Mis. RELATIONSHIP OF GUARDIAN (Pader Instruction No. 20)1  SIDCODE  TEL: OFF.  STATUS "Processional   Files   NRI - NRI   Sole Proprietor   Partnership Firm   Others    GOCUPATION   Processional   Housewife   Business   Sour/Loc   Retired   Student   Others    GOCUPATION   Processional   Housewife   Processional   Housewife   Processional    GOCUPATION   Processional   Housewife   Processional   Housewife   Processional    GOCUPATION   Processional   Housewife   Processional   Processional    GOCUPATION   Processional   Housewife   Processional	Sole / First Applicant		D	D M	M	ΥΥ	YY								
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COUNTRY  PIN CODE  COMMUNICATION   Please tick ( / )  (Refer Instruction No. 10)  I/We wish to receive the following document(s) via E-mail instead of Physical mode   Account Statement   Annual Report   Other Statutory Information    ONLINE ACCESS** (this enables you to access your investment portfolio through our website - www.birlasunlife.com)   Yes   No   IPlease tick ( / )   Board / Committed   IPlease tick ( / )  (Refer Instruction No. 2 (iv))  Board / Committee Resolution / Authority Letter   Memorandum & Articles of Association   Trust Deed   Partnership Deed   Bye-laws   Overseas Auditor's certificate    List of Authorised Signatories with names, designations & specimen signature   Third Party Declaration (Refer Instruction no. 5)  ACKNOWLEDGEMENT SLIP (To be filled in by the Investor)   COMMON APPLICATION FORM    Birla Sun Life   Asset Management Company Limited    One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013    Collection Centre / BSI AMC Stamp & Signature	Trust NRI - NRE  OCCUPATION   Please tick ( \( \sigma \)    Professional House  MODE OF HOLDING   Please tick ( \( \sigma \)   (Please tick ( \( \sigma \) ))    Joint Single  MAILING ADDRESS OF FIRST / SOLE	Bank & FI  Wife Business  Bease Refer Instruction No. 2(vi)  Anyone or S	Sole Proprietor  Service R  Survivor (Default option is Anyon dress is not sufficient. Please p	etired e or survivor)	artnersh	iip Firm	Othe	Others	te		(Please Specify)	(y)	t Body		
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Ioll Free: 1-800-270-7000/ 1-800-22-7000   sms 'GAIN' to 56161   Email: connect@birlasunlife.com	Trust	Bank & FI  wife Business  ease Refer Instruction No. 2(v))  Anyone or S  EAPPLICANT (P.O.Box Add  (For NRI / FII application in addition  (For NRI / FII application in addition  telefer Instruction No. 10)  Document(s) via E-mail instead  our investment portfolio through our wet  ( / )   (Refer Instruction No. 2 (w))  thority Letter Memory  a filled in by the Investor)	Sole Proprietor  Service R  Survivor (Default option is Anyon dress is not sufficient. Please properties in the mailing address above)  COUN  Ad of Physical mode  besite - www.birlasunlife.com)  COMMON A	etired  e or survivor) provide full a  ITRY	artnersh  Stu  ddress.) (In	Account Trust C attion (F	Other of the other	Others ers  NRIs/Fils)  se tick ( ✓ )I  Partnership ion no. 5)	□ Annu □ Deed □	CITY  Bye-law	(Please Specify)	N CODE  Othe	er Statute	certificate	
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# COMMON APPLICATION FORM For Resident Indians and NRIs/Fils

Received from Mr. / Ms. \_

[Please tick (/)] ENCLOSED PAN Proof KYC Complied



	(PLEASE READ THE INS	I KUCI IUNS BE	FUKE FILLI	NG UP THE	FUKIVI)									Applic	ation N	0.
Ref. Instruction No. 9																
RN Declaration - Upfront commission s TRANSACTION CHARGES	. ,,		•									_	butor.			
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Email Id																
AME OF FIRST / SOLE APPLIC																
AME OF THE SECOND APPLIC																
AME OF THE THIRD APPLICA	Mr. Ms. M/s.		NAC.													
Applicant	PAN (Mandatory)		KYC Complie	d	Dat	te of Birth*	•									
Sole / First Applicant					M	VI Y	/ Y	Υ								
Second Applicant					M	VI Y	/ Y	Υ								
Third Applicant					M	VI Y	/ Y	Υ								
Guardian/POA Holder					M	и У	/ Y	Y								
** Mandatory in case the First AME OF THE GUARDIAN (In		cant is minor	) / CONTA	ACT PERSO			I / PnA I	HOI DER (	In case o	nf Non-ir	nhivihn	al Invest	tors)			
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RELATIONSHIP OF GUARDIA	N (Refer Instruction No. 2(ii))															
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☐ Professional ☐ F	lousewife 🗌 Busin	ess 🗌 S	Service	☐ Retire	ed [	Student		Others _			(Plea	ise Specify)				_
MODE OF HOLDING (Please tick (	✓ )] (Please Refer Instruction No.	. 2(v))														
☐ Joint ☐ Si	ngle 🗌 Any	one or Survivo	r (Default option	on is Anyone or s	urvivor)											
MAILING ADDRESS OF FIRST /	SOLE APPLICANT (F	2.0.Box Address is	not sufficient	t. Please provid	de full addre	ss.) (Indian Ad	ldress in c	ase of NRIs/FI	lls)							
CITY				STATE								P	IN CODE			
verseas Address (For NRIs/FII	s) (For NRI / FII applicatio	n in addition to ma	iling address	above)												
											CITY					
0-1				0011117701							CITY					
STATE				COUNTRY								Р	IN CODE			
COMMUNICATION [Please tick (	✓ )] (Refer Instruction No. 10)															
I/We wish to receive the follow	ing document(s) via E-m	ail instead of P	hysical m	ode		Accou	nt State	ment		Annua	ıl Repor	rt	☐ 0th	er Statut	ory Info	rmation
NLINE ACCESS** (this enables you to a	access your investment portfolio thro	ough our website - wy	ww.birlasunlife	e.com)	_ Y	es 🗌	No	[Please tick	( 🗸 )]							
Occuments Submitted   IPlea	use tick ( 🗸 )] (Refer Instruction No	o. 2 (iv))														
Board / Committee Resolution List of Authorised Signatories		Memorandur s & specimen s				Trust		Partne	•	ed $\square$	Bye-la	ws 🗌	Overseas A	Auditor's	certifica	te
ACKNOWLEDGEMENT SLIF	(To be filled in by the Investor	r)	COM	MON APPL	ICATION	I FORM				<b></b>				Applic	ation No	
	Birla Sı		Asset	t Man	ager	nent (	Com	npanv	Lim	ited						
Birla Sun Life		Centre , Tower 1,			•						0 013				on Centre	
Mutual Fund	Toll Free : 1-80	00-270-7000/	1-800-22-	7000   s	ms 'GAII	V' to 5616	I   Em	nail: conne	ct@birlas	unlife.co	m		BS	SLAMC Sta	ımp & Siç	nature

NECS Form Yes No

First (as a						ınt details) Refer		
	: Account Holders Name ppearing in Bank Records)							
Nam	e of the Bank							
Bran	nch Address							
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Acco	ount Type [Please tick (✓)] SAVINGS	□ CURRENT □ NRI	□NRO □FCNR □OTH	IFRS				
	ount No.						MICR CODE	
			(This is an 11 Digit no. available in	- Charus assu)			This is a 9 digit r	number next to your Cheque Number. Please attach an extra bl
IFSC	CODE		( This is an TT Digit no. available if	n cneque copy)			cancelled chequ	e or a clear photocopy of a cheque
INV	ESTMENT DETAILS [Please tick ( 🗸 )]	(Refer Instruction No. 5 & 14)						
Ė	rate cheque / demand draft must be issu	ed for each investment,	drawn in favour of respective so	cheme name. Ple	ase write ap	propriate schem		Plan / Option / Sub Option.
S. No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (applicable only for Dividend option)	Amount Invested (₹)	DD Charges	Net Amount Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)	Bank and Branch and Account Number
			Scheme Name			1 212 (1)		
1.	BSL		Plan / Option					
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	e of Account : Saving / Current / NRE / NF		•	•				
DEN	MAT ACCOUNT DETAILS (OPTIONA	L) (Please ensure that th	e sequence of names as mention	ned in the applica	tion form ma	tches with that of	the A/c. held with the	depository participant.) Refer Instruction No. 3
NS	DL: Depository Participant Name	:	DF	PID No.: I I	V		Beneficiary A	c No.
				D	£:-: A /-	N-		
CD	SL: Depository Participant Name	:		Bene	eficiary A/o	NO.		
RFD	EMPTION / DIVIDEND REMITTANG	CF (Please attach a copy of can	celled cheque Refer Instruction No.8 & 13)					
		SE (House diagona copy of carl	osinou direque noisi monucolorino.e a rej		7			
	Electronic Payment				Chequ	e Payment		
	the responsibility of the Investor to ensur out at recipient/destination branch corresp			ic				
f MIC	R and IFSC code for Redemption/Dividend	Payout is available all pay	outs will be automatically process	ed as Electronic Pa	yout-RTGS/I	IEFT/Direct Credi	/NECS.	
NON	AINATION DETAILS (Refer Instruction N	a 7) In case of multiple nam	inces more than 1 up to 2 fill a co	anarata namination fa	rm quailable in	this hasklet or on a	ur wahaita (unun hirlagun)	ifa com)
	We hereby DO NOT wish to nominate (						Address :	Signature of First / Sole Applicant
telati	onship :		Date of	f Birth(In Case of I				
Guard	ian/parent Name (in case of minor):				Vlinor)	1 1		
	,		Witness N		Minor)			
44			Witness N		Minor)			Signature of Nominee or Parent / Guardian
	ssave attached the nomination details separ	rately with this applicatio			Minor)			Signature of Nominee or Parent / Guardian Signature of the Witness
] I ha	ave attached the nomination details separ	rately with this applicatio			Minor)			·
l ha	ave attached the nomination details separ				Minor)			Signature of the Witness
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DEC To, The 1 Birla Havir	ave attached the nomination details separ  LARATION(S) & SIGNATURE(S)  frustee, Sun Life Mutual Fund	(Refer Instruction No. 1) tatement of Additional Inforsiand regulations governing	n form (Please tick if applicable)  mation / Scheme Information Docur the scheme. I/We hereby declare	went of the Scheme that the amount in	, I/We hereby	scheme is through	legitimate	Signature of the Witness
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I ha  DEC  To, The 1  Birla  Havir and a sourc the d  For N inves of the from I/We **I ha pa an  The A  Mutu  S. No.	LARATION(S) & SIGNATURE(S)  Frustee, Sun Life Mutual Fund  ng read and understood the contents of the Si tigree to abide by the terms, conditions, rules eso only and does not involve and is not desi me Tax Act, Anti Money Laundering Laws, An etails of the scheme & I/we have not received ton-Individual Investors: I/We have not received ton-Individual Investors: I/We have not received ton-Individual Investors: I/We have net so entity while applying for the investments a rding the eligibility, validity and authorization IRIs only: I/We confirm that I am/we are Non funds in my/our Non-Resident External/Non confirm that details provided by me/us are tra ave voluntarily subscribed to the on-line acc anager of Birla Sun Life Mutual Fund) and or tricularly mentioned on the website www. bi d shall not at any time deny or repudiate the o ARN holder has disclosed to me/us all the con al Funds from amongst which the Scheme is  Scheme Name  BSL  BSL	(Refer Instruction No. 1)  Instruction No. 1)  Instruction No. 1)  Instruction Inforest and regulations governing gned for the purpose of the tit Corruption Laws or any of nor have been induced by methat the object clause of I fund and the application is und I/We, including the entiof the entity and/or the app Residents of Indian National-Resident Ordinary /FCNR are and correct.  In the session of the app Residents of Indian National President Ordinary /FCNR are used to the company of the purpose of the session	mation / Scheme Information Docur g the scheme. I/We hereby declare c contravention of any Act, Rules, R ther applicable laws enacted by the any rebate or gifts, directly or indire the constitution document of the er s being made within the limits for th ty, if the case may arise so, hereby licants who have applied on behalf of ality/Origin and that I/we have remit tocount. (Refer Inst. No. 6)  h the internet facility provided by B derstood and agree to abide the te undertake to be bound by the sam d by me and i shall be solely liable for all commission or any other mode), if you.  Swee (applicable only for	ment of the Scheme that the amount in tegulations, Notifica government of Ind ctly in making this i hittly (viz. MOA / Acc a garee to indemnif of the entity. ted funds from abround the continuous and condition of the entity. The continuous and condition of the entity. The continuous and the costs and condition of the entity. The costs and continuous and	e, I/We hereby rested in the a titions or Direction or Di	cheme is through titions of the provis time. I/We have u I, etc.), allows us t all requirements / SLMF in case of a pproved banking c t Company Ltd. (In of the internet fa te the obligations of thereof, impeting Schemes	legitimate ons of the nderstood of the nderstood of papply for conditions by dispute nannels or exercise of versions of various the nannels of various the nanne	Signature of the Witness  Date D D M M Y Y Y Y  First Applicant / Authorised Signatory  Second Applicant  Third Applicant  Payment Details  No. Bank and Branch
To, The 1 Birla Havinr Havinr Havinr Horo Horo Horo The A Mutu  S. No.	LARATION(S) & SIGNATURE(S)  Frustee, Sun Life Mutual Fund  gread and understood the contents of the SI gree to abide by the terms, conditions, rules  zes only and does not involve and is not desi me Tax Act, Anti Money Laundering Laws, An  etails of the scheme & I/we have not received  lon-Individual Investors: I/We hereby confire  terment in this scheme of Birla Sun Life Mutua e entity while applying for the investments a  dring the eligibility, validity and authorization  fills only: I/We confirm that I am/we are Non  funds in my/our Non-Resident External /Non  confirm that details provided by me/us are tra  ave voluntarily subscribed to the on-line act  anauger of Birla Sun Life Mutual Fund) and conficularly mentioned on the website www. bi  d shall not at any time deny or repudiate the call of the confirmation of the scheme is  Scheme Name	(Refer Instruction No. 1)  Instruction No. 1)  Instruction No. 1)  Instruction Inforest and regulations governing gned for the purpose of the tit Corruption Laws or any of nor have been induced by methat the object clause of I fund and the application is und I/We, including the entiof the entity and/or the app Residents of Indian National-Resident Ordinary /FCNR are and correct.  In the session of the app Residents of Indian National President Ordinary /FCNR are used to the company of the purpose of the session	mation / Scheme Information Docur y the scheme. I/We hereby declare contravention of any Act, Rules, R ther applicable laws enacted by the any rebate or gifts, directly or indire the constitution document of the er s being made within the limits for th ty, if the case may arise so, hereby licants who have applied on behalf of ality/Origin and that I/we have remit account. (Refer Inst. No. 6) h the internet facility provided by I derstood and agree to abide the te undertake to be bound by the sam d by me and I shall be solely liable for all commission or any other mode), f you.  Sweet (applicable only for	ment of the Scheme that the amount im tegulations, Notifica government of Ind ctly in making this i thitly (viz. MOA / AO, e same. I/We are co y agree to indemnif of the entity. ted funds from abro Birla Sun Life Asse erms and condition e. I further underta or all the costs and o payable to him for the pto Dividend option)	e, I/We hereby vested in the stations or Directia from time to the stations or Directia from time to the stations of the stati	cheme is through titions of the provis time. I/We have u I, etc.), allows us t all requirements / SLMF in case of a pproved banking c t Company Ltd. (In of the internet fa te the obligations of thereof, impeting Schemes	legitimate ons of the nderstood of the nderstood of papply for conditions by dispute nannels or exercise of versions of various the nannels of various the nanne	Signature of the Witness  Date D D M M Y Y Y Y  First Applicant / Authorised Signatory  Second Applicant  Third Applicant  Payment Details  No. Bank and Branch

# GENERAL INSTRUCTIONS

- Please read the terms of the Key Information Memorandum and the **Statement of Additional Information / Scheme Information Document** 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.
- Àpplication form should be completed in English and in BLOCK LETTERS. Please tick in the appropriate boxes wherever applicable. ii)
- pupilicatine.

  The significance in the light of the Indian languages specified in the eight schedule of the Constitution of hole. Thumb impressions must be attested by a magistrate or a notary public or a special executive magnitude 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 shall of the H. U. F. iii)
- iv)
- v)

insper official seal. Applications by minors should be signed by the guardians. In case of H. U. F., the Karshould sign on behalf of the H. U. F. the Asplications by minors should be signed by the guardians. In case of H. U. F., the Karshould sign on behalf of the H. U. F. the Asplication 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 money. The designated Investors Service Centre will stamp and return the acknowledgment slip in the application from, to acknowledgment slip in the application from, to acknowledgment slip in the application from, to acknowledgment slip and the application from, to acknowledgment slip in the application from the Asplication from the Asplic

against the net investment amount.

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 installment's No. of installments) amounts to ₹ 10,000/- or more. The transaction charges shall be deducted of 3-4 installments. Investor should note that, as per SEBI circular no. SEBI/IMD/CIR No. 4/ 1682/3009, 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.

- STORPARTICULARS

  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. Then minor shall be the first and the sole holder in the account (folio). No ionit holder will be allowed in an account (folio) where minor is the first or sole holder. Guardian in the account (folio) where minor is the first or sole holder. Guardian in the account folio) who behalf of the minor should either be a natural guardian [i.e. tather 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 of legal guardian) should mandatify be provided while opening of the account (folio). Also, nomination shall not be allowed in a holio/account held 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 the relevant resolution or authority to make the application as the case maybe, or duly notarised copy thereof, along with the Memorandum and Articles of Association/ Bye Laws must be lodged with the application form.

  Documentation to be submitted by Corporate Investors/Societies / Trusts/Partnership Firms/ Fils.
- iii)
- iv)

Documentation to be submitted by corporate investors/or	Juleiles/ Trusis	/raillieis	silip i littis/ i l	115		
	Corporate Investors	Trusts	Societies	Partnership Firms	Flls	POA
Board/ Committee Resolution/ Authority Letter	1	/	/	✓	1	
Memorandum & Articles of Association	1					
Trust Deed		1				
Partnership Deed				✓		
Bye-laws			/			
List of authorised Signatories with name, designation & Specimen Signature	1	1	1	1	1	
Overseas Auditor's certificate					1	
Power of Attorney						1

The Power of Attorney

The Power of Attorney should necessarily be signed by both the investor and the constituent Power of Attorney
Where only uncertified photocopies of the documents are submitted attached to the application form, the onus for
authentication of the documents so submitted shall be on investors and the BSLAMC MF will accept and good faith on
uncertified / not properly authenticated documents submitted/attached with the application form. Submission of such
documents by investors shall be full and final proof of the non individual investors authority to invest and the BSLAMCMF
shall not be liable under any circumstances for any defects in the documents so submitted.

Non-Individual investors are required to ensure that the object clause of the constitution document fyiz. MOA / AOA / Trust
Deed, etc.) permits investment in the scheme(s) of Birla Sun Life Mutual Fund. BSLAMC/BSLMF shall accept and process
the applications made by these entities in good faith by relying on the undertaking given with respect to the fundinity, validity
and compliance with all felevant formalities/conditions etc. in the application for making such investments with Birls sun Life
Mutual Fund. Further, BSLAMC/BSLMF/Tusteesor any of its affiliates shall not be liable in case of any dispute arising with
respect to eligibility, validity and authorization of the entity and/or the applicants who have applied on behalf of the entity, as
applicable.

- 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 is 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 first named holder. All communications will also be sent to the first named holder. Include the preference of Plan/option on the application form, the investment will be deemed to be for the default option. v)

investors should clearly 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.

3(A). BANK AND PEMMANENT ACCOUNT NUMBER DETAILS

Bank Details: In order to protect the inderest 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.

PAN Details: It is compulsory for all investors to quote their Permanent Account Number (PAN) and submit copy of the PAN card is sued by the Income as & 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 naking the application is a minor, PAN details of all holders should be submitted. In case the investor naking the application is a minor, PAN details of all holders should be submitted. In case the investor naking the application is a minor, PAN details of all holders should be submitted. In case the investor naking the application is a minor, PAN details of all holders should be submitted. In case the investor naking the application is a minor, PAN details of all holders should be submitted. Investor the mandatory requirement of PAN proof submission, however sufficient documentary evidence shall have be submitted to Birlia 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 et cleases refer instructions in SIP Application Form.

(B) DEMAT ACCOUNT DETAILS: Option to hold Units in dematerialized (demat) form.

Consequently, the Unithodor but of Scheme(s)/Plan(s) Shall have an option to subscribe to/ hold the units in electronic (demat) form.

Consequently, the Unithodor the Sch

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 DPs name, DP ID Number and the Beneficiary account humber of the applicant hold with the DP at the time of subscribing to the units. Applicants must ensure that the superior of the pages as mentioned in the application form matches with that of the beneficiary account with the DP. America, PAN details, NC 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 incomplete? Incorrect or matching with the depository records, the application shall be treated as application for pressor (an end-man) mode and accordingly units will be allotted in physical (non-demat) mode, subject to fibring complete in all other aspects. Unifolders who have opted to look all allotted units in electronic (demat) form will receive payment of redemption? dividend proceeds into bank account linked to their Demat account.

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.

In case, the Unitholder desires 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/Remat Request Form to their Depository Participant(s). Investors should ensure that the combination of names in the account statement is the same as that in the demat account.

KNOW YOUR CUSTOMER (KYC)
According to guidelines issued by SEBI under 'The Prevention of Money Laundering Act, 2002', Mutual Funds are required to follow enfanced know your customer (KYC) norms.

Ioniow enrinanced know your customic (KY-I) rioms, and in the process KYC compliance. In the Sest Management Company Limited (BSLAMC) has made arrangements with CDSL Ventures Limited ("CVL"), to process KYC compliance. Investors can visit branches of BSLAMC or may visit www.birlasunlife.com, www.amfiindia.com and www.cdslindia.com to know detailed procedure for KYC compliance. On submission of KYC application alongwith the prescribed documents KYC Acknowledgement letter "will be issued by CVL to the applicant.

Effective January 01, 2011 it is mandatory for all category of investors to provide a copy of KYC Acknowledgement letter issued by CVL for all investment transactions (excluding Micro SIP) made on or after January 01, 2011, irrespective of

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) êach of the applicants, in case of investments in joint names; and (iii) Guardian in case of investments in behalf of minor.

Applications without KYC Acknowledgement letter for the specified category of investors are liable to be rejected. Provided turther, where it is not possible to verify the KYC compliance status of the investor at the time of allotment of units, the BSLAMC shall verify the KYC compliance status of the risvestor at the time of allotment of units. In the event of non compliance of KYC requirements, the BSLAMC reserves the right to freeze the folio of the investors with viat of transactions or affect mandatory redemption of unit holdings of the investors at the applicable NAV, subject to payment of exit boad. Investors who have obtained MIN allotment letter by submitting the PAN copy are deemed to be KYC compliant. 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 to the CYL. Any change in this details like change of Name / Address / Status / Signature, etc. should be given by Investor directly to CYL in the prescribed manner.

- EOFPAYMENT

  Resident investors may make payment by cheque payable locally in the city where the application form is submitted at the local Brida Sun Life Asset Management Company Ltd. (BSLAMC) 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 any 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 I 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 lirk http://www.rbi.org.in/Scripts/bs\_viewcontent.aspx?ld=2016.
- Payment through Stock invest, outstation cheques, cash 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.

- Feynment flought cock mises, outstanding expectation and separation of payments, details of source account, source bank name and source branch name should be mentioned.

  Restriction on acceptance of Third Party Payment:

  1 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 (KYC)' norms under Prevention of Money Laundering Act, 2002 (PMLA). Bird Sun Life Mustal Fund (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 foil has to be one of the joint holders of the bank account from which payments made.

  c) BSLAMC shall not accept 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 love and affection or as gift for a value not exceeding < 50.0000/- (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 follo as a guardian.

  ii. Payment by Employer on behalf of employee under Systematic Investment Plans (SIP) through Payroll deductions.

  iii. Custodian on behalf of a fill or a client.

- ii. 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 from without which such applications will be rejected not processed returned.

  i. Mandatory 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 i.e. third party. In order for an application to be considered as valid, investors and the person making the payment is hould attach their valid KYC Ackrowledgement Letter to the application form.

  ii. A separate, complete and valid 'Third Party Press contact the investor's. The declaration has to be given by the person making person person that it is not a subscription of the person making the payment is made and the relationship with the investor's. The declaration has to be given by the person making the payment is the source of funds to be sourced the making the making the person making the payment is 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 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 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 (ii.e. account into which redemption-dividend proceeds are to be paid), if the namebank 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 harmed applicantifivestor should submit any one of the following documents:

  a. a copyl of the bank passbook or a statement of bank account having the name and address of the account holder and account number; [In original] the bank on its letter the address of the account holder and account numbe

  - and account number.

    a letter (in rotiginal) 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).

    # Investors should also bring the original documents along with the documents mentioned in (a) above to the ISCs/Official Points of Acceptance of \$BSMET. The cogy of such 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.

    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.
- Lesi wittig systems at meri panks, any related communication from the bank towards a change in bank account number should accompany the application from for subscription of units bashquist and the property of the person of the property of

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

# 6. NRIINVESTORS

Repartiation basis:

Payments by NRIs/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 theques drawn on non-resident external accounts payable at par and payable at the cities where the Investor Service Certifes are located. In case of Indian rupee drafts purchased and subscriptions through NRIs / FCNR account, an account debit certificate 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.

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  Unit holder can nominate (in the manner prescribed under the SEBI Regulations), maximum upto 3 person(s) in whom the Units held 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 layour of each of the nominees against their name and such allocation / share should be in whole numbers without any decimals making a total of 00 percent. In the event of the Unithoders 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.
- the nominees.

  Nomination made by unitholder shall be applicable for investments in all the Schemes in the folio or account man own or 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.

  The nomination can be made only by individuals applying for I hoding units on their own behalf singly or jointly in favour of one or more persons. Non-individuals including 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.
- noticers. In case a folio has joint holders, all joint holders should sign the request for nomination / cancellation of nomination, even if the mode of holding is not 'joint'. A minor can be nominated 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. vi)
- vii)
- by the unit holder. The Applicant is advised that, in case of Single Holding, the Guardian to a winfor Nominee should be a person other than the Applicant.

  Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of these offices or a religious or charitable trust.

  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 dan be a Nominee subject to the exchange controls in force, from time to time.

  Nomination shall not be allowed in a folio/account held on behalf of a minor.

  Nomination shall not be allowed in a folio/account held on behalf of a minor.

  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 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. viii)

- xii)
- The nomination details as registered with the Depository Participant shall be applicable to unitholders who have opted to hold units in Demat mode. xiii)

hold units in Dematmode.

xiv) Nomination shall be mandatory for new folios/accounts opened by individuals especially with sole/single holding and no new folios/accounts or individuals is nigiple 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 redemptions/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). 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.

8.

Electronic rayout.

DIRECT APPLICATIONS

Investors should ensure to write the word 'DIRECT' in the column 'ARN No' or 'Broker Code' in their applications for purchases/sdiditional purchases/switches/tresh Systematic Investment Plans (SIP)/ fresh Systematic Transfer Plans (STP) in all such cases where applications are not routed through any distributor/agen/broker.

In cases where unit holder uses a pre-printed transaction slip/application form where details in the 'ARN No' or 'Broker Code' column is already printed, unit holder should cancel the ARN No' Broker Code, write 'DIRECT' in the said column. It should also be counter signed by the unit holder all joint holder(s). Transactions slips/application forms where the column under 'ARN No or 'Broker Code' is provided, has to be filled by the unit holder as 'DIRECT' for processing the same as Direct applications.

Investors can submit their applications for purchases /additional purchases/ switches/fresh SIP/ fresh STP at any of the Official Point(s) of Acceptance of Birla Sun Life Mutual Fund. The list of Official Point(s) of Acceptance is available on the website of Birla Sun Life Mutual Fund (www.birlasunlife.com).

# E-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.

- party interception of the documents and contents of the documents becoming known to finirg parties.

  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.

  ii) A CIP will enable the user to view the Account Statement on the Birla Sun Life website (www.birlasunlife.com) and other services mentioned herein after.
- 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.
- v)
- vii)
- The responsibility for history of the UP of the US or is solely of the user and BSLAMC shall not be responsible for the user missus of the CIP nay many many many was the US or is solely of the user and BSLAMC shall not be responsible for the US or is solely of the user and BSLAMC shall not be responsible for the US or is solely of the user and conditions as SSLAMC shall not be responsible for the US or is solely of the US or is solely o
- sourware contained in such PL or internet access device through which the online services are accessed by the user is 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 buser 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 personable 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.

  The user shall not interfere with, after, amend, tamper with or misuse in any manner whatsoever the Online Services and in the event of any damage due to improper or iradulent 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 infinate BSLAMC thereof in writing within 10 they day of receipt of the Statement of Account / poly document in respect of the user, falling which the statement / policy will be deemed to be correct and accepted by the user. He vaser or his/her account to any third person so far as is nequered 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:

  a) Misuse of Password: The user acknowledges that if any third person obtains access to his/her password such hird

- xiii)
- xiv)
- 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 BSLAMC. 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. Internet Frauds: The Internet per se is susceptible to a number of frauds, misuse, hacking and other actions, which could affect Instructions to BSLAMC, whilst BSLAMC shall aim to provide security to prevent the same, there cannot be any shall separately evaluate all fisks arising out of the same. Shall separately evaluate all fisks arising out of the same. The technology for enabling the services offered by BSLAMC could be affected by virus or other malicious, destructions or orunning odde, proderment or macro. This touch result in delays in the processing of instructions and other such tailures and inabilities. The user understands that BSLAMC disclaims all and any ligibility, whether direct or indirect, whether arising out of 10ss of profit or otherwise arising out of any failing by BSLAMC to honour any user instruction for whatslosever reason. The user understands and 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 various services. BSLAMC's liability
- BSLAMC shability.

  The user understands that BSLAMC may, at its absolute discretion, after, suspend or terminate any of the services completely or partially without any notice to the Unitholder and without assigning any reasons thereof.

- 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 risk yievy any service charges as applicable from a privilege services to the users without any charge. However users not consenting to the charge then, may opt out of the CIP facility. BSLAMC reserves the exclusive right to amend the terms and conditions for issue and use of CIP to the users without any prior approval of the user concerned, and thereafter such amended terms and conditions will apply to the user. In consideration of BSLAMC providing the user with the online services, user agrees to indemnify and keep safe, harmless and indemnified BSLAMC, its constituent companies, their officers, employees, successors and assigns from and against all actions, claims, demands, proceedings, loss, damages, costs, charges and expenses whatsover without BSLAMC or its constituent companies may at any time incur, sustain, suffer or be put to as a consequence of or ansing out of the user use of 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 junguithorized, fraudulent usage or misuse of the user's CIP to access BSLAMC will be the user's sole responsibility b) Non-compilance of the terms and conditions relating to online services on BSLAMC will be the user's sole responsibility b) Non-compilance of the terms and conditions relating to online services on BSLAMC will be when the user's sole responsibility b) Non-compilance of the terms and conditions relating to online services on BSLAMC will be the user's sole responsibility b).
- The Courts in Mumbai alone shall have jurisdiction over all disputes arising out of or in respect of this arrangement.

# DIVIDEND SWEEP FACILITY

- IVIDEAD SWEEP FACILITY

  I) Under this Facility the Unitholders can got for switching the dividend earned under any of the Open-ended Scheme into any other Open-ended Equity Scheme or into the Retail Plan (wherever available) of any of the following Open ended schemes of the Company of the C

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

Funds transfer shall be elected only in the recipient/bestination barinobrations participating in a tost when it is the responsibility 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:

Incorrect and insufficient details are provided.

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 the Branch/b 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.

# SCHEMES ON OFFER

Investors are required to indicate their choice of Plan and Option at the time of filling up the Common Application Form. Please note that if the same is not mentioned, BSLMF will allot you units under the Default Option of the scheme as stated below.

SCHEME	PLAN	OPTION	SUB OPTION / FACILITY	MINIMUM INVESTMENT AMOUNT (*)	DEFAULT OPTIONS		
			EQUITY FUNDS				
Birla Sun Life Advantage Fund Birla Sun Life Freedom Fund Birla Sun Life India Opportunities Fund Birla Sun Life India Opportunities Fund Birla Sun Life Index Fund Birla Sun Life Man Miller Fund Birla Sun Life India Genlext Fund Birla Sun Life Light Fund Birla Sun Life New Millennium Fund Birla Sun Life New Millennium Fund Birla Sun Life Bay India Fund Birla Sun Life 915 Fund Birla Sun Life 1915 Fund Birla Sun Life 1916 Fund Birla Sun Life Top 100 Fund Birla Sun Life International Equity Fund Plan A Birla Sun Life International Equity Fund Plan B Birla Sun Life International Equity Fund	Dividend Growth <sup>®</sup>	Payout / Reinvestment / Sweep		FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment		
Birla Sun Life Special Situations Fund	Dividend Growth	Payout / Reinvestment / Sweep		FP : ₹ 5,000/- AP : ₹ 1,000/-	Choice of Plan : Growth     Choice of Option : Reinvestment		
Birla Sun Life Dividend Yield Plus	Dividend Growth PF	Payout / Reinvestment / Sweep  Dividend  Growth	Payout / Reinvestment / Sweep	FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment		
Birla Sun Life Tax Relief '96 Birla Sun Life Tax Plan	Dividend Growth	Payout / Reinvestment / Sweep		FP : ₹500/- AP : ₹500/-	Dividend Payout		
Birla Sun Life Commodity Equities Fund (Global Precious Metals Plan,	Retail Plan	Dividend Growth	Payout / Reinvestment / Sweep	FP : ₹5,000/- AP : ₹1,000/-	Choice of Plan : Retail Plan     Choice of Option : Growth		
Global Agri Plan & Global Multi-Commodity Plan)	Institutional Plan	Dividend Growth	Payout / Reinvestment / Sweep	FP : ₹ 5,00,00,000/- AP : ₹ 10,000/-	Choice of Facility : Reinvestment		
Birla Sun Life Enhanced Arbitrage Fund	Retail Plan	Dividend Growth	Payout / Reinvestment / Sweep	FP : ₹ 5,000/- AP : ₹ 1,000/-	Choice of Plan : Retail Plan     Choice of Option : Dividend		
	Institutional Plan	Dividend Growth	Payout / Reinvestment / Sweep	FP : ₹ 5,00,00,000/- AP : ₹ 10,000/-	Choice of Facility: Reinvestment		
Birla Sun Life India Reforms Fund	Dividend Growth	Payout / Reinvestment		FP : ₹ 5000/- AP : ₹ 1000/-	Dividend Reinvestment		
Birla Sun Life Pure Value Fund	Dividend Growth	Payout / Reinvestment		FP : ₹ 5000/- AP : ₹ 1000/-	Choice of Plan : Growth     Choice of Option : Reinvestment		
Birla Sun Life Small & Midacp Fund	Dividend Growth	Payout / Reinvestment		FP : ₹ 5000/- AP : ₹ 1000/-	Dividend Payout		
			FUND OF FUNDS				
Birla Sun Life Asset Allocation Fund	Aggressive	Dividend Growth	Payout / Reinvestment				
	Moderate	Dividend Growth Dividend	Payout / Reinvestment	FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment		
	Conservative	Growth	Payout / Reinvestment				
			DEBT FUNDS				
Birla Sun Life Savings Fund^	Institutional Plan	Daily Dividend Weekly Dividend Growth	Reinvestment Payout / Reinvestment	FP : ₹1,00,00,000/- AP : ₹1,00,000/-	Application for         Default Plan         Option /Facility           <₹1 Cr		
	Retail Plan			FP : ₹10,000/- AP : ₹1,000/-	≥₹1 Cr Institutional Daily Dividend Reinvstmt		
Birla Sun Life Short Term Opportunities Fund	Retail Plan	Weekly Dividend Dividend Growth	Reinvestment Payout / Reinvestment	FP : ₹ 10,000/- AP : ₹ 1,000/-	Growth		
(*)FP : Fresh Purchase: AP : Additional Purch	Institutional Plan	Weekly Dividend Dividend Growth	Reinvestment Payout / Reinvestment	FP : ₹2,00,00,000/- AP : ₹10,000/-			

SCHEME	PLAN	OPTION	SUB OPTION / FACILITY	MINIMUM INVESTMENT AMOUNT (*)	DEFAULT OPTIONS
			DEBT FUNDS		,
Birla Sun Life Monthly Income	Monthly Dividend Quarterly Dividend	Payout / Reinvestment / Sweep Payout / Reinvestment / Sweep		FP : ₹25,000/- AP : ₹5,000/-	Choice of Plan : Growth     Choice of Option within Monthly Dividend     : Dividend Reinvestment
	Growth			FP : ₹5,000/- AP : ₹1,000/-	Choice of Plan within Quarterly Dividend     Dividend Reinvestment
Birla Sun Life Ultra Short Term Fund^	Institutional Plan	Daily Dividend Fortnightly Dividend Weekly Dividend Growth	Reinvestment Payout / Reinvestment Payout / Reinvestment	FP : ₹2,00,00,000/- AP : ₹10,000/-	Application for Default Plan Option /Facility  < ₹ 2 Crs Retail Fortnightly
	Retail Plan	Daily Dividend Fortnightly Dividend Growth	Reinvestment Payout / Reinvestment	FP : ₹ 10,000/- AP : ₹ 1,000/-	≥ ₹ 2 Crs Institutional Dividend Reinvstmt
			DEBT FUNDS		
Birla Sun Life Medium Term Plan	Institutional Plan	Weekly Dividend Fortnightly Dividend Monthly Dividend Growth	Reinvestment Payout / Reinvestment Payout / Reinvestment / Sweep	FP : ₹1,00,00,000/- AP : ₹10,000/-	Choice of Plan : Retail Choice of Option : Growth Choice of Facility : Fortnightly Dividend
	Retail Plan		Delauraturat	FP : ₹5,000/- AP : ₹1,000/-	Reinvestment
Birla Sun Life Cash Plus^	Retail Dividend Retail Growth	Daily Dividend	Reinvestment	FP : ₹10,000/- AP : ₹1,000/-	Application for Plan Option /Facility
	Institutional Dividend Institutional Growth	Daily Dividend Weekly Dividend	Reinvestment Payout / Reinvestment	FP : ₹1,00,00,000/- AP : ₹1,00,000/-	< ₹ 1 Cr Retail Dividend Reinvstmt  ≥ ₹ 1 Cr but Institutional Daily Dividend
	Institutional Premium - Dividend	Daily Dividend	Payout / Reinvestment		- <₹5 Crs Reinvstmt
	Institutional Premium - Growth	Weekly Dividend	Payout / Reinvestment	FP : ₹5,00,00,000/- AP : ₹1,00,000/-	≥₹5 Crs Institutional Premium Premium Reinvstmt
Birla Sun Life Dynamic Bond Fund	Retail Plan	Monthly Dividend Sweep <sup>\$</sup> Monthly Dividend Quarterly Dividend Growth	Payout / Reinvestment / Sweep Payout / Reinvestment / Sweep	FP : ₹ 5,00,000/- AP : ₹ 1,000/- FP : ₹ 5,000/- AP : ₹ 1,000/- FP : ₹ 5,000/- AP : ₹ 1,000/- FP : ₹ 5,000/- AP : ₹ 1,000/-	Choice of Option : Quarterly Dividend     Choice of Sub-Option : Dividend Reinvestment
Birla Sun Life Income Fund	Growth Quarterly Dividend	Payout / Reinvestment / Sweep		FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment
Birla Sun Life Cash Manager^	Growth			FP : ₹10,000/-	Application for Plan Option /Facility
	Dividend	Daily Dividend Weekly Dividend	Reinvestment Reinvestment	AP : ₹1,000/-	<₹1 Cr Dividend Weekly Dividend
	Institutional	Growth Weekly Dividend Daily Dividend	Reinvestment Reinvestment	FP : ₹1,00,00,000/- AP : ₹1,00,000/-	Reinvstmt  ≥₹1 Cr Institutional Daily Dividend Reinvstmt
Birla Sun Life Government Securities Fund	Long Term	Growth	December / Decimonships and	FP : ₹ 5,000/-	
runa	Short Term (Retail) Plan	Dividend  Daily Dividend  Growth	Payout / Reinvestment Reinvestment	AP : ₹ 1,000/- Maximum Amount#: ₹ 5 lacs (For Long Term Plan)	Growth
	Short Term (Institutional) Plan	Daily Dividend Weekly Dividend Dividend Growth	Reinvestment Reinvestment Payout / Reinvestment	FP : ₹5,00,00,000/- AP : ₹1,00,000/-	
Birla Sun Life Floating Rate Fund	Short Term Plan^	Institutional	Daily Dividend Reinvestment Weekly Dividend Reinvestment Growth	FP : ₹ 5,00,00,000/- AP : ₹ 1/-	Application for Plan Option /Facility  <₹ 5 Crs Daily Reinvstmt
		Daily Dividend Weekly Dividend Growth	Reinvestment Reinvestment	FP : ₹ 5,000/- AP : ₹ 1,000/-	Dividend Reinvstift  ≥₹5 Crs Institutional Daily Dividend Reinvstmt
	Long Term Plan	Retail Plan	Weekly Dividend Reinvestment Growth	FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment
		Institutional Plan	Daily Dividend Reinvestment Weekly Dividend Reinvestment Growth	FP : ₹ 2,00,00,000/- AP : ₹ 1,00,000/-	
Birla Sun Life Gilt Plus	Regular Plan	Quarterly Dividend Growth	Payout / Reinvestment / Sweep		
	Liquid Plan	Quarterly Dividend Annual Dividend Growth	Payout / Reinvestment / Sweep Payout / Reinvestment / Sweep	FP : ₹5,000/- AP : ₹1,000/-	Growth
	PF Plan	Quarterly Dividend Growth	Payout / Reinvestment / Sweep Quarterly Gain / Annual Gain		
Birla Sun Life Income Plus	Dividend Growth	Payout / Reinvestment		FP : ₹5,000/- AP : ₹1,000/-	Dividend Reinvestment
Birla Sun Life MIP	Monthly Dividend Monthly Payment Growth	Payout / Reinvestment / Sweep Instant / Deferred		FP : Dividend & Payment Option ₹ 25,000/- Growth ₹ 5,000/- AP : ₹ 1,000/-	Choice of Option within Monthly Dividend     : Dividend Reinvestment     Choice of Option within Monthly Payment Plan     : Instant
Birla Sun Life MIP II	Savings 5	Monthly Dividend Monthly Payment Growth	Payout / Reinvestment / Sweep	FP : Dividend & Payment Option ₹ 25,000/-	Choice of Option : Growth
	Wealth 25	Monthly Dividend Monthly Payment Growth	Payout / Reinvestment / Sweep	Growth ₹ 5,000/- AP : ₹ 1,000/-	Choice of Sub-Option within Monthly Dividend Option : Dividend Reinvestment
*)FP : Fresh Purchase; AP : Additional Purchase	\$ Dividend earned under the Schen	ne may be switched into any other C	pen-ended Equity Scheme or Balanced Scheme a	as opted by the Unitholder.	

<sup>(\*)</sup>FP: Fresh Purchase; AP: Additional Purchase \$ Dividend earned under the Scheme may be switched into any other Open-ended Equity Scheme or Balanced Scheme as opted by the Unitholder.

<sup>^</sup>For Institutional Plan under Birla Sun Life Cash Plus, Birla Sun Life Savings Fund, Birla Sun Life Cash Manager, Birla Sun Life Floating Rate Fund (Short Term Plan): In case of investment by a company belonging to the same group vis-à-vis the company having existing outstanding investment balance in Institutional Plan / 