

Common Transaction Form

(For existing unit holders only)

Distributor Name & ARN	Sub Broker/Branch Code	Sub-Broker ARN	EUIN	Date
J.M.LAL ARN-26254			E044555	___/___/___

Unit Holder Information

Folio : _____ Mode of Holding : _____

Scheme : _____

First Unitholder	Second Unitholder	Third Unitholder
Name _____	Name _____	Name _____
PAN No _____	PAN No _____	PAN No _____

Additional Purchase Request

I/We wish to purchase additional units in the scheme as per details given below :

Amount(Rs.) in Figure : _____ Rs. in Words : _____

Drawn On : _____ Cheque/DD No : _____ Date : _____ Branch : _____

Redemption Request

Please Redeem Amount (Rs.) in Figure : _____ Rs. in Words : _____

Or Units : All Units

Switch/Transfer Request

Please refer to the offer document of the scheme you are switching from and to.

I Wish to Switch Rs.: _____ Or Units: _____

To Scheme : _____ Option: Growth Div Payout Div Reinvest

STP Request

From Scheme : _____ To Scheme : _____ Option: Growth Div Payout Div Reinvest

From Date: _____ To Date: _____

Fixed Transfer: Frequency : _____ Date : _____ Amount (Rs.) : _____ No of Installments : _____

Capital Appreciation STP: Frequency : _____ Date : _____

SWP Request

From Scheme : _____ Amount (Rs.) : _____

From Date: _____ To Date: _____ Frequency : _____

- Kindly STOP the SIP / SWP of Rs. _____ dated _____ of each month with IMMEDIATE effect.
- Kindly STOP the STP to _____ with IMMEDIATE effect.
- Kindly change the broker/ARN to _____
- Please update the PAN / KYC in your records:
- Please update my Mobile No _____ and Email ID _____

Update/Change Bank

Bank Name : _____ Branch Address : _____ A/C No. : _____

MICR : _____ IFSC Code : _____ Type : _____ Pin Code : _____

Nomination I/We wish to nominate/change nominee as under :

Name and Address of Nominee(s)	Date of Birth	Name & Address of Guardian	Signature of Nominee(Optional)/Guardian of Nominee(Mandatory)	Proportion (%) in which the units will be shared by each Nominee (Should aggregate to 100%)
Nominee 1	(to be furnished in case the nominee is a minor)			

All Applicants must sign in case of joint holding.

→ 1st Unit Holder		2nd Unit Holder	
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Acknowledgement

(For Office Use Only)

Folio : _____ ARN : **ARN-26254** EUIN : **E044555**

Applicant Name: _____

Scheme : _____

Bank : _____ Cheque No _____ Amount : _____

Option : Add Pur SIP/SWP Change of Broker/ARN/Bank/Nominee

Redemption STOP of SIP/SWP Update PAN/KYC

Switch STOP of STP Contact Update