



Birla Sun Life
Mutual Fund

The name inspires trust

COMMON TRANSACTION FORM (For existing investors)
(FOR ONE TRANSACTION ONLY)



Broker Code	Sub Broker Code	FOR BMF USE

Form No.

Please strike off the transactions type that are not filled.

(A) UNIT HOLDERS INFORMATION

Folio No.

NAME		Permanant Account Number (PAN) <small>(Supporting documents / Form 60 / Form 61 is must if transaction amount is Rs. 50,000 and above. Refer Instruction No. 7) (Mandatory)</small>
First Holder	<input type="text"/>	<input type="text"/>
Second Holder	<input type="text"/>	<input type="text"/>
Third Holder	<input type="text"/>	<input type="text"/>
Guardian <small>(In case of Minor)</small>	<input type="text"/>	<input type="text"/>

(B) ADDITIONAL PURCHASE (Refer Instruction No. 3, 4 & 5)

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
Rs. (figures)	<input type="text"/>	Cheque/DD No.	<input type="text"/>	Dated	<input type="text"/>
Rs. (words)	<input type="text"/>				
Drawn on (Bank)	<input type="text"/>				
Branch	<input type="text"/>	DD charge : Rs. <small>(Refer Instruction No. 4)</small>	<input type="text"/>		

In case you do not mention the Plan and Option, units will be alloted under default option as per respective scheme(s) offer document(s).

(C) REDEMPTION (Refer Instruction No. 9)

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
Rs. (figures)	<input type="text"/>				
Rs. (words)	<input type="text"/>				
OR	<input type="text"/>				
No. of Units	<input type="text"/>				

Direct Credit to existing bank account (Please refer Instruction No. 9 overleaf) :
I/We request you to activate Direct Credit (DCR) facility for my Folio and remit the redemption/dividend proceeds through DCR.
(Please ✓ in this Box)

(D) LATERAL SHIFT/SWITCH (Refer Instruction No. 6)

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
No. of Units	<input type="text"/>	OR	Rs. (figures)	<input type="text"/>	
Rs. (words)	<input type="text"/>				
Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>

ACKNOWLEDGEMENT

Form No.

Signature & Stamp

Received for ADDITIONAL PURCHASE / REDEMPTION / LATERAL SHIFT/SWITCH / CHANGE OF BANK DETAILS / DIRECT CREDIT / CHANGE OF ADDRESS / EMAIL CONFIRMATION / ONLINE ACCOUNT ACCESS

Folio No.

from Mr./Ms./M/s.

For Only Additional Purchase: Cheque / Draft No. for Rs. (Figures)

Rs. (words)

drawn on (bank) Branch

