COMMON APPLICATION FORM

For Resident Indians and NRIs/FIIs



Application No.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM)

Ganesh S. Shanbhag
ARN - 0988

ef	Instruction	No	9		

2.

3.

ARN Declaration - Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors assessment of various factors including the service rendered by the distributor. TRANSACTION CHARGES FOR ADDI ICATIONS BOILTED THROUGH DISTRIBUTORS/AGENTS ONLY (Befer Instruction 1 (viii)

In case the subscription (lumpsum) amount is ₹ 10,000/- or more and your Distributor has opted to receive Transaction Charges, ₹ 150/- (for first time mutual fund investor) or ₹ 100/- (for invest other than first time mutual fund investor) will be deducted from the subscription amount and paid to the distributor. Units will be issued against the balance amount invested.
EXISTING UNITHOLDER please fill in your Folio No. & Name and then proceed to Section 5 (Applicable details and Mode of holding will be as per the existing Folio No.

FIRST	SOLE APPLICANT INFORMATION	(MANDATORY)	(Refer Instruction No. 2.3.4) Fresh /

FIRST/SOLE APPLICANT INFOR	MATION (MANDATORY) (Refe	er Instruction N	0. 2,3,4)	Fresh /	New In	vestors	s fill in	all the b	olocks	s. (1 to 1	10) In (case of	investr	nent "	'On bel	nalf o	f Mino	r", Ple	ase Re	efer In	struct	tion no	. 2(ii)			
Mobile No.		Exis	ting Fol	lio No).																					
Email Id																										
NAME OF FIRST / SOLE APPLICANT	Mr. Ms. M/s.																									
NAME OF THE SECOND APPLICANT	Mr. Ms. M/s.																									
NAME OF THE THIRD APPLICANT	Mr. Ms. M/s.																									
Applicant	PAN (Mandatory)	С	KYC omplied			[)ate c	of Birth	1**																	
Sole / First Applicant						M	M	Y	Y	Y	Y															
Second Applicant						M	M	Y	Y	Y	Y															
Third Applicant						M	M	Y	Y	Y	Y															
Guardian/POA Holder						M	M	Y	Y	Y	Y															
** Mandatory in case the First / Sole										_			_													
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Mr. Ms. M/s.																										
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STATUS [Please tick (🗸)]																										
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Trust NRI - NRE	Bank & Fl	🗌 Sole F	Proprieto	or		Pa	rtner	ship F	irm			Othe	rs					(Plea	ise Spec	:ify)						
OCCUPATION [Please tick (\checkmark)]																										
Professional House	ewife 🗌 Business	Servi	се	F	Retired	I		Studer	nt		Othe	ers					(Ple	ase Sp	ecify)							
MODE OF HOLDING (Please tick (🗸)) (Pl	lease Refer Instruction No. 2(v))																									
□ Joint □ Single	Anyone or	Survivor (Def	fault option	is Anyo	ne or surv	vivor)																				
MAILING ADDRESS OF FIRST / SOLI	E APPLICANT (P.O.Box A	ddress is not s	ufficient. F	Please	provide	full ad	dress.)	(Indian	Addre	ess in c	ase of	NRIs/F	ls)													
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Overseas Address (For NRIs/FIIs)	(FOLINELY FIL application in addi	uon to maining	auuress a	DOVE)																						
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STATE				COUN	NTRY														P	PIN CO	ODE					
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I/We wish to receive the following d		ead of Physi	ical mod	de				Acco	ount	State	ment	t			Ann	ual	Repo	rt		C] Ot	her {	Statu	tory	Infor	rmation
ONLINE ACCESS** (this enables you to access)	your investment portfolio through our v	vebsite - www.bir	rlasunlife.c	om)			Yes		N	0	[Plea	ise tick	(🗸)]				-							-		
	k (√)] (Refer Instruction No. 2 (iv))			,																						
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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 In	struction no. 5)		

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) **COMMON APPLICATION FORM**

Application No.

	Birla Sun Life Asset Management Company Limited
Birla Sun Life	One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400

One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013 Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 56161 | Email: connect@birlasunlife.com

Date : ____

Collection Centre / BSLAMC Stamp & Signature

[Please tick ()] ENCLOSED	PAN Proof	KYC Complied	NECS Form	Yes	No

Mutual Fund

Pacaivad from Mr / Ma

BAN	K ACCOUNT DETAILS (Please note t	hat as per SEBI Regula	tions it is mandatory for investo	ors to provide the	ir bank accou	unt details) Refer	Instruction No. 3(A)	
	Account Holders Name ppearing in Bank Records)								
Nam	e of the Bank								
Bran	nch Address								
Pin C	Code	City							
Acco	ount Type (Please tick (🗸)) 📃 SAVINGS		RE NRO FCNR OTH	IERS					
Acco	ount No.						MICR CO	DE	
IESC	CODE		(This is an 11 Digit no. available i	n Cheque copy)				igit number next to your Cheque Numb neque or a clear photocopy of a cheque	
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separ S.	rate cheque / demand draft must be issue	ed for each investmen		Amount	DD	Net Amount	Cheque/DD No./UTR I		
No.	*Cheque / DD Favouring Scheme Name (refer Instruction 5)	Plan / Option	Sweep to (applicable only for Dividend option)	Invested (₹)	Charges	Paid (₹)	(in case of NEFT/RTG		d Account Num
1.	BSL		Scheme Name						
			Plan / Option Scheme Name						
2.	BSL		Plan / Option						
3.	BSL		Scheme Name						
			Plan / Option Scheme Name						
4.	BSL		Plan / Option						
(Тур	e of Account : Saving / Current / NRE / NR	0 / FCNR / NRSR) *AI	purchases are subject to realizat	tion of cheque/DE				L	
DEN	NAT ACCOUNT DETAILS (OPTIONA	L) (Please ensure that t	he sequence of names as mentio	ned in the applica	tion form ma	tches with that o	f the A/c. held with t	he depository participant.) Re	efer Instruction N
	DL: Depository Participant Name:		וח	PID No.: I	N		Beneficiary	A/c No	
NS	DE: Depository Participant Name:	·					Demonorary	700 110.	
CDS	SL: Depository Participant Name:			Ben	eficiary A/o	: No.			
DEN	EMPTION / DIVIDEND REMITTANC		ncolled observe Defer Instruction No. 0. 9, 10)						
			nooled cheque herer instruction No.0 & 13)			_			
	Electronic Payment				Chequ	e Payment			
	the responsibility of the Investor to ensure out at recipient/destination branch corresp			iic					
f MIC	R and IFSC code for Redemption/Dividend F	Pavout is available all pa	youts will be automatically process	ed as Electronic P	avout-RTGS/I	NEFT/Direct Credi	t/NECS.		
	ominee (upon such documentation) shal We hereby DO NOT wish to nominate (C	-	•				•	Signature of First / Sole	Applicant
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elati	onship :		Date o	f Birth(In Case of					
luard	ian/parent Name (in case of minor):				Minor)				
	•		Witness		Minor)				
44.00			Witness		Minor)			Signature of Nominee or Par	ent / Guardian
		ately with this annlicati			Minor)				
	ss ave attached the nomination details separa	ately with this applicati			Minor)			Signature of Nominee or Par Signature of the Wi	
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1.	BSL		Scheme Name	Plan / Option				
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3.	BSL		Scheme Name	Plan / Option				
4.	BSL		Scheme Name	Plan / Option				

COMMON APPLICATION FORM

For Resident Indians and NRIs/FIIs



Application No.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM)

Ganesh S. Shanbhag
ARN - 0988

ef	Instruction	No	9		

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NAME OF FIRST / SOLE APPLICANT	Mr. Ms. M/s.																									
NAME OF THE SECOND APPLICANT	Mr. Ms. M/s.																									
NAME OF THE THIRD APPLICANT	Mr. Ms. M/s.																									
Applicant	PAN (Mandatory)		KYC Complied			ſ)ate c	of Birth	1**																	
Sole / First Applicant						M	M	Y	Y	Y	Y															
Second Applicant						M	M	Y	Y	Y	Ŷ															
Third Applicant						M	M	Y	Y	Y	Ŷ															
Guardian/POA Holder						M	M	Y	Y	Y	Ŷ															
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NAME OF THE GUARDIAN (In case	First / Sole Applicant i	s minor) /	CONTAC	; i pe	KSÜ	N - DE	SIG	NATIC	JN /	POÁ	HULD	JER (in cas	se of	Non	-ind	ividu	iai li	ivest	ors)						
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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, designation	ons & specimen signature	Third Party E	Declaration (Refer Ir	nstruction no. 5)		

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) **COMMON APPLICATION FORM**

Application No.

	Birla Sun Life Asset Management Company Limited
Birla Sun Life	One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400

One India Bulls Centre , Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013 Toll Free : 1-800-270-7000/ 1-800-22-7000 | sms 'GAIN' to 56161 | Email: connect@birlasunlife.com

Date : ____

Collection Centre / BSLAMC Stamp & Signature

[Please tick ()] ENCLOSED	PAN Proof	KYC Complied	NECS Form	Yes	No

Mutual Fund

Pacaivad from Mr / Ma

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S.	Scheme Name	Plan / Option		ep to	Net Amount		Payment Details	ľ
No.	ocifente nume		(applicable only fo	or Dividend option)	Paid (₹)	Cheque/DD No./UTR No. (in case of NEFT/RTGS)		
1.	BSL		Scheme Name	Plan / Option				
2.	BSL		Scheme Name	Plan / Option				
3.	BSL		Scheme Name	Plan / Option				
4.	BSL		Scheme Name	Plan / Option				

INSTRUCTIONS FOR FILLING APPLICATION FORM

5.

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.
- . Application form should be completed in English and in BLOCK LETTERS. Please tick in the appropriate boxes wherever applicable. ii)
- npuncaute. The signature should be in English or in any of the Indian languages specified in the eighth schedule of the Constitution of noila. Thumb Impressions must be attested by a magistrate or a notary public or a special executive magistrate under isher official seal. Applications by minors should be signed by the guardians. In case of H. U. F., the Karta should sign on erhalf of the H. U. F. iii) India
- iv)
- v)
- vi) vii)
- viii)
- Inster official seal: Applications by minors should be signed by the guardians. In case of H. U. F., the Karta Should sign on behalf of the H. U. F. . The applications by minors should be signed by the guardians. In case of H. U. F., the Karta Should sign on behalf of the H. U. F. . The applications 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 be rejected and the money paid will be refunded wilhout 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 form, to acknowledge receipt of the application. All cheques and bank drafts must be drawn in favour of "Scheme Name" and crossed "Account Payee Only". A separate cheque or bank drafts must be drawn in favour of "Scheme Name" and crossed "Account Payee Only". A separate applicantis[5], corresponding to the said folio. It is the responsibility of the investor to ensure correctness of such details provided. The personal details and Bank Account details as registered in the existing folio number as provided would apply to the said investors area with a site registered details using upper application inform, the AMC rouchases under this near any existing motion with the interest on the said investor agains. TRAASACTION CHARGES SEBI with the intent to enable investment by people with small saving potential and to increase reach of Mutual Fund threas of the distributor. The and the distributor is considered vital, has allowed AT 0000/L and abone. In interasction Charges Pi 16 distributor is considered vital, has allowed AT 0000/L and bioma. The AMC itom time to times. The Mutual Fund Investor of an out of a subscription applicantis in the ansate of the investor the ransection. Charges Pi 26 (1000) for threaser of the distributor. The and anu

 - 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 (SPI): 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 x No. of installments) amounts to ₹ 10,000/- or more. The transaction charges shall be deducted in 3-4 installments. Investor should note that, as per SEBI circular no, SEBI/IMD/CIR No. 4/ 16823009, dated June 30, 2009, the upfront commission, if any, on investment and 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.
- INVESTOR PARTICULARS
- ii)
- STOR PARTICULARS 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. The minor shall be the first and the sole holder in the account (folio). No iont holder will be allowed in an account (folio) where minor is the first or sole holder. Guardian in the account (folio) no 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 or legal guardian) should mandatorily be provided while opening of the account (folio). Also, normination shall not be allowed in a lolio/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, et the relevant Power of attorney or than a the Memorandum and Articles of Association/ Bye Laws must be lodged with the application of shore, along with the Memorandum and Articles of Association/ Bye Laws must be lodged with the application form.
- iii) iv)

	Corporate Investors	Trusts	Societies	Partnership Firms	Flls	POA
Board/ Committee Resolution/ Authority Letter	1	~	1	1	~	
Memorandum & Articles of Association	1					
Trust Deed		1				
Partnership Deed				1		
Bye-laws			1			
List of authorised Signatories with name, designation & Specimen Signature	1	1	1	1	1	
Overseas Auditor's certificate					~	

1 Power of Attorney

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 is osubmitted shall be on investors and the BSLAMC / Me will accept and acting occuments by investors shall be full and inter shall be on investors and the vestors and the sometry to invest and the BSLAMC / Mession shall not be liable under any circumstances for any defects in the documents by investor shall not be shall not be liable under any circumstances for any defects in the documents by submitted. Non-Individual investors are required to ensure that the object clause of the constitution document by the application form, taking any of atthe process the applications made by these entities in good failth by relying on the undertaking given with respect to the authority, validity and compliance with all relevant formalities/conditions etc. in the application for making such investments with Brid Sun Life Mutual Fund. Further, BSLAMC / BSLMF "rustees or any of the athildes shall not be liable in case of any dispute ansing with respect to eligibility, validity and authorization of the entity and/or the application to meak applied on behall of the entity, as applicable. espect to

- Applicable. Applicable. Applications and 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 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 to sign. In the event the account has more than one registered unit holders and the mode of holding is 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. Investors should clearly indicate their preference of Planvoption or the application form. If no plan is selected in the application form, the investment will be deemed to be for the default option. Am DECMANENT ACCOLUMENT NUMBER DETAILS v)
- vi)

mode

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 DP's name, DP ID Number and the Beneficiary account number of the application hold with the DP that the time of subscribing to the units. Application must ensure that the sequence of the names as mentioned in the application form wither with that of the beneficiary account held with the DP that the sequence of the names as mentioned in the application form wither with that of the beneficiary account held with the DP that the sequence of the name as mentioned in the application form with the with that of the beneficiary account held with the etails meet, the application shall be treated as application form are found to DP taken the application shall be treated as application form are found to DP taken the application shall be treated as application form are found to DP taken the application shall be treated as application form are found to DP taken the application shall be treated as application form physical (non-demat) mode and accordingly units will be allotted in physical (non-demat) mode, subject to the lang complete in all other aspects. Unitholders who have oped to count linked to their Demat account.

account linked to their Demataccount. 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.

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

tonow enhanced know your customer (KYC) norms. Birl Sun Life Asset 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.amfindia.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 in brough a PoA; (ii) éach of the applicants, in case of investments in joint names; and (iii) Guardian in case of investments to befaild of minor. Applications without KYC Acknowledgement letter for the specified category of investors are liable to be rejected. Provided truther, where it is not possible to verify the KYC compliance status of the investor at the investor at the investor at the investor of the investor at the applicable NAV, subject to payment of exit load. Investors who have obtained MIN allotment to letter by submitting the PAN corpor are deemed to be KYC compliance all details of the investor in the Mutual Fund records will be replaced by the details as given in KYC Application of KYC Compliance all details of the investor in this details like change of Name / Address / Status / Signature, etc. should be given by Investor with to record to the CVL. Any change in this details like change of Name / Address / Status / Signature, etc. should be given by Investor of the CVL in the prescribed manner. MODE OF PAYMENT

- E OF PAYMENT Resident investors may make payment by cheque payable locally in the city where the application form is submitted at the local Birla Sun Life Asset Management Company Ldd. (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 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. Investors, are requested to note that only cheques of value of upt ₹ 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 linkthtp://www.rbi.org.in/ScriptSps_viewcontent.aspx?ld=2016. ii)
- 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.
- Persimin through souch mesk, obtained the quesk, seak and through any party heat mesh with othe accepted.
 Persian to the payments, details of source quesk, seak and through any party heat mesh mesh with othe accepted.
 Persiant to the AMFI Best Practice Quidelines circular on 'Risk mitigation process against Third-Party Cheques in mutual trud subscriptions' read with compliance with Know your Customer (KYC) norms under Prevention of Money Laundering Act, 2002 (PMLA), Birth Sun Life Asset Management Company Limited (BSLAMC) Birth Sun Life Asset Asset Management Company Limited (BSLAMC) Birth Sun Life Asset Sun Barta (Limited (BSLAMC) Birth Sun Life Asset Sun Barta (Limited (BSLAMC) Birth Sun Life Asset Sun Barta (Limited (BSLAMC) Birth Sun Life Barta Barta (Limited (BSLAMC) Shall not accept subject to submite documentation which payment is made.
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 - d)
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- ensemble young outperformed and provide under Systematic Investment Plans (SIP) through Payroll deductions.
 iii. Custodian on behaft of an FII or a client.
 In case of exceptional situations' mentioned above, investors are required to submit following documents/declarations alongwith the application form without which such applications will be rejected not processed refunded:
 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 is should attach their valid KYC Acknowledgement Letter to the application form.
 iii. A separate, complete and valid Third Party Party Party Party in Inter alia, containing the details of the bank account from which the payment is and and the person making the payment is mould attach their valid KYC Koron Without Status and the person making the payment is mould attach their valid KYC Acknowledgement Letter to the application form.
 iii. A separate, complete and valid Third Party P

 - and account number, "Second to backnet the subarchief of a sum account numb are namely are namel
 - - usersering system at mere banks, any related communication from the bank towards a change in bank account number should accompany the application form for subscription of units. Payment by Prefunded Instrument: (1) If the subscription is settled with pre-funded instruments such as Pay Order, Derman Draft, Banker's cheque, etc., a Certificate (in original) from the issuing banker must account an untruber application, stating the Account holder's name and the Account runber which has been debiled for issue of use instrument. The adapting the Account holder's name and the Account runber which has been debiled for issue of use instrument. The adapting the Account holder's name and the Account runber which has been being the application is the adapting the Account holder's name and the Account runber which has been being the application is the adapting the Account holder's name and the Account runber who has the advect the application of the sub-rule adapting the Account holder's name and the Account runber be account be added for issue of sub-rule adapting the Account holder's name and the Account runber who has the adapting the Account at the adapting the Account and the application form and name should match with the name of the first named unitholder. Cash shall not be accepted for investments of ₹ 50000- or more. This also should be accompanied by a certificate from the banker giving name, address and PAN (if evailable) is also should be accompanied by a certificate from the banker giving name, address and PAN (if evailable) and receives and a strument instrument. The name dimitificate should read with the parson who has requested for the payment instrument. The name mentioned on the Certificate should read with the parsen who has requested for the payment instrument. The name mentioned on the transfer full signature, name, employee code, bank seaal and contact number. Payment by **FIGS. NET**, **ECS**, Bank transfer, etc; Acopy of the instruction to the bank stating the account number debiled mus ii.

account. 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 uch rejection

6. NRI INVESTORS

7.

8

9.

NRI INVESTIONS 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 of by way of cheques drawn on non-resident external accounts payable at par and payable at the cities where the Investor Service Centres 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.

An Repatriation associated with the control of the data committing 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. NOMINATION

- INA IUN 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 tayour of each of the nominees against their name and such allocations are should be in whole numbers without any decimals making a total of 100 percent. In the event of the Unitholders 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.
- ii)
- the nominees. Nomination made by unitholder shall be applicable for investments in all the Schemes in the folio or account and every new nomination for 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. 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 / hoding nuits 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. iii) iv)
- noicers. 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. v)
- person other man me 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. vi)
- virtue of these offices or a religious or charitable frust. The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hind Undivide d ramily or a Power of Attorney holder. A non-resident india can be a Nominee subject to the exchange controls in force, from time to time. Nomination shall not be allowed in a follo/account held on behalf of a minor. Nomination shall not be allowed in a follo/account held on behalf of a minor. Nomination in respect of the units stands rescinded upon the transfer of units. 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. vii)
- viii)
- x) xi)
- xii)
- The nomination details as registered with the Depository Participant shall be applicable to unitholders who have opted to hold units in Dematmode. xiii)

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Electronic rayour. DIRECT APPLICATIONS Investors should ensure to write the word 'DIRECT' in the column 'ARN No' or 'Broker Code' in their applications for purchases/additional purchases/switches/fresh Systematic Investment Plans (SIP) fresh Systematic Transfer Plans (STP) in all such cases where applications are not routed through any distributor/agent/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 built of in processing ine 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.birlasunific.com).

10. E-MAIL COMMUNICATION

14.

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 informed 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.

11.

- TERMS AND CONDITIONS FOR ON-LINE ACCOUNT ACCESS 10 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. 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. ii)
- The user shall have no objection to BSLAMC verifying the identity before allotting the CIP. iii) iv)
- The CIP allotted to the user is confidential in nature and the user confirms that helshe 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 user/misuse of the CIP in any manner whatsoever. V)
- The User shall inform BSLAMC immediately in case the CIP becomes known to any other person. BSLAMC may in its absolute discretion, issue to the user a new CIP on similar terms and conditions or under such terms and conditions as BSLAMC may deem fit. vi)
- vii) viii)
- ix)
- absolute discretion, issue to the user a new CIP on similar terms and conditions or under such terms and conditions as BSLAMC may deem itt. BSLAMC will take reasonable efforts to keep its website updated so as to provide most current information to the user. The user acknowledges that BSLAMC expressly disclaims liability for errors or omissions in the information on the website. The user also recognises that because of communication and other issues, it is possible that the site may not be operating/working on many occasions. The user also agrees that the lock and feel of the Web screen and outputs there from may differ based on the nature of the software used by the user to browse the site. The user agrees not only to the terms and conditions here in contained but also the disclaimer and other intaiters, as may be displayed/posted on the site. BSLAMC may, in the interest of the user request a tax contirmation of the Instructions and any additional information that BSLAMC may, in the interest of the user request a tax contirmation of the Instructions and any additional information that and additional information is received from the user. The user shall be fully liable to BSLAMC for every transaction entered into using the CIP facility, whether with or without the knowledge of the user and consequences thered. The user shall not use the online services on a PC or other Internet access device which belongs to any other person or which is provided to the user indemnifies and agrees to keep BSLAMC fail times saved, defended, harmless and indemnified from and against any and all loss, costs, outgoings, expenses, claims, damages or consequences whatsoever and BSLAMC and against any and all loss, costs, outgoings, expenses, claims, damages or consequences whatsoever and helpshe shall be bound to compensate. BSLAMC shall not be liable for the on-suitability thereof or if any other data or software contained in such C or Internet access through which be oprised or if any other data or software contain
- souware contained in such PC or internet access device through which the online services are accessed by the user is amaged of tostin any manner whatsoever. The user is aware of all security risks including possible third party, interception of his/her account and be content of his/her account becoming known to hit/d parties. The user 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 tokes of information or obtaining of information by any third party will be to his/her account and BLAMC shall. In on way, be held responsible for the same and this shall not be considered as a breach of its or its constituent company user confidentially. The user argress that the use of account and BLAMC shall. In on way, be held responsible for the same and this shall not be considered as a breach of its or its constituent company user confidentially. The user argress 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 states of any damage due to improper or traductient use by the user, he / Shall be liable in damages to BLAMC. In case of any discrepancy in the details of any transaction carried out in respect of the user, shall be obliged to infinate BSLAMC thereof in writing of writin 10 (file geating to the user of his/her account the user, so necessary to give effect to any instructions or to comply with any order of Court or of any competent/ statutory authority or as is required under applicable law.
- xi) xii)
- xiii)
- xiv)
- xv) 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
- SCHEMES ON OFFER

- applicable to the use of the password as contained herein are complied with at all times.
 b) Internet Frauds: The Internet per se is susceptible to a number of trauds, 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 guarantee from such Internet trauds, hacking and other actions, which could affect Instructions to BSLAMC. The user shall separately evaluate all risks arising out of the same.
 c) The technology for enabling the services offered by BSLAMC could be affected by virus or other malicious, destructive or corrupting code, programme or macro. This could result in delays in the processing of Instructions of Tailure in the processing of instructions and other such failures and inabilities. The user understands that BSLAMC claims all and any liability, whether direct or indirect, whether arising out of loss of profit or otherwise arising out of any tailure or inability by BSLAMC to honour any user instruction for whatsdever reason. The user understands and accepts that BSLAMC BSLAMC shall bisclaim all and not be responsible for any of the aforesaid risks. The user also accepts that BSLAMC shall disclaim all initial in the processing risks. not be responsi 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 xvi) various services. BSLAMC's liability
- BOLAMIC strability. 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. xvii) xviii)
- completely or partially without any notice to the Unitholder and without assume support of terminate any of the SerVices The user agrees that at present online services are offered as a privilege services to the users without any charge. However, BSLANC may levy any service charges as applicable from time to time in consideration for the services provided herein. However users not consenting to the charge then, may opt out of the CIP facility. BSLANC may ensure that the services provided herein. However users not consenting to the charge then, may opt out of the CIP facility. BSLANC may ensure that the services provided herein. However users not consenting to the charge then, may opt out of the CIP facility. In consideration of BSLANC providing the user with the online services, user agrees to indemnify and keep safe, harmless and indemnified BSLANC, its constituent companies, their offices, employees, successors and assigns from and against all actions, claims, demands, proceedings, loss, damages, costs, charges and expenses whatsoever which BSLANC or successors and assigns to the successor what services may out of the user user of the said online services. XX)
- 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) lilegal, unauthorized, fraudulent usage or misuse of the user's CIP to access BSLAMC S Website; all requests carrying the user's CIP as evidenced by electronic records available at BSLAMC will be the user's sole responsibility b) Non-compliance of the terms and conditions relating to online services on BSLAMC's website. xxi) The Courts in Mumbai alone shall have jurisdiction over all disputes arising out of or in respect of this arrangement.

12. DIVIDEND SWEEP FACILITY

- (VIDEND SWEEP FACILITY i) Under this Facility the Unitholders can opt 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 Bird, Sun Life Mutual Hund viz, Bird Sun Life Schwigs Fund, Bird Sun Life Uitty Short Term Fund, Bird Sun Life Income Fund, Bird Sun Life Mutual Fund viz, Bird Sun Life Schwigs Fund, Bird Sun Life Uitty Short Term Fund, Bird Sun Life Income Fund, Bird Sun Life Income Plus, Bird Sun Life Schwigs Medium Term Plan, Bird Sun Life Monthly Income, Bird Sun Life Monthly Income Fund, Bird Sun Life Monthly Informatic Bond Fund, Bird Sun Life Schwiger Ben, Bird Sun Life Monthly Income, Bird Sun Life MPB, Bird Sun Life Mir I or Bird Sun Life Short Term Opportunities Fund. In case the investor fails ospecify his preference of Option Pacility for the scheme into which the dividend has to be sweeped, Growth option under the respective Scheme/Plan shallbe default option and the application form shall be processed accordingly.
- scneme/rian shall be default option and the application form shall be processed accordingly. ii) For debt Schemes: Under Dividend Sweep Exality the unitholders can option switching the dividend earn under open ended debt schemes into any other equity or balanced scheme of Brid Sun Life Mutual Fund. For schemes providing sweep facility please refer the table below. The dividend (net of applicable TDS, if any) shall be switched subject to minimum investment/sweep amount of ₹ 1000 or the minimum investment eligibility criteria of the scheme into which the dividend is sweeped in: whichever is higher, at applicable NAS based prices plus applicable load, (ex-dividend NAV, if the opted Scheme has a record date on the date of exercise of sweep option).

RTGS/NEFT 13.

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

Funds transite shall be elected only in the recipient/oestimation bank/branch is participating in a rescale specially 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 of the ab 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. b.
- 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' bank resulting of subuption 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 is subuptions and administrative guidelines issued or which may be issued by the RBI or any other regulatory authorities applicable to the transactions relating of RTGS/NEFT whether directly.

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Birls San Life S	Birla Sun Life Special Situations Fund		Payout / Reinvestment / Sweep			
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Conservative Growth Payout / Reinvestment Payout / Reinvestment Payout / Reinvestment Birla Sun Life Savings Fund^ Institutional Plan Daily Dividend Weekly Dividend Growth Reinvestment Growth Reinvestment Payout / Reinvestment FP : ₹ 1,00,000/- AP : ₹ 1,00,000/- AP : ₹ 1,00,000/- AP : ₹ 1,000/- AP : ₹ 1,000/		Moderate	Growth	Payout / Reinvestment		Dividend Reinvestment
Birla Sun Life Savings Fund^ Institutional Plan Daily Dividend Weekly Dividend Growth Reinvestment Payout / Reinvestment FP : ₹ 1,00,00,00/- AP : ₹ 1,00,00/- Application for Default Retail Plan Weekly Dividend Dividend Growth Reinvestment Payout / Reinvestment FP : ₹ 1,00,00/- AP : ₹ 1,000/- AP : ₹ 1,000/- AP : ₹ 1,000/- AP : ₹ 1,000/-		Conservative		,		
Institutional Plan Weekly Dividend Growth Payout / Reinvestment AP ₹ 1,00,000/- for Plan Option / Facility Retail Plan Retail Plan Weekly Dividend Dividend Growth Reinvestment Payout / Reinvestment Reinvestment Payout / Reinvestment FP ₹ 1,00,000/- AP						
Retail Plan Weekly Dividend Dividend Growth New Plan New Plan New Plan Pl	Birla Sun Life Savings Fund [^]	Institutional Plan	Weekly Dividend			for Plan Option /Facility
Birla Sun Life Short Term Retail Plan Dividend Payout / Reinvestment FP : ₹ 1,000/- Opportunities Fund Growth Growth Reinvestment AP : ₹ 1,000/- Institutional Plan Weekly Dividend Reinvestment FP : ₹ 2,00,00,000/-		Retail Plan				
Institutional Plan Weekly Dividend Reinvestment Payout / Reinvestment FP : ₹ 2,00,00,000/-		Retail Plan	Dividend			Growth
		Institutional Plan	Dividend	Reinvestment Payout / Reinvestment		

(*)FP : Fresh Purchase: AP : Additional Purchase

^Please refer next page

\$ Currently Trigger Facility is available under Birla Sun Life Frontline Equity Fund (Growth option) for electronic mode only.

SCHEME	PLAN	OPTION	SUB OPTION / FACILITY Debt funds	MINIMUM INVESTMENT AMOUNT (*)	DEFAULT OPTIONS
Birla Sun Life Monthly Income	Monthly Dividend	Payout / Reinvestment / Sweep	DEDTFUNDS	FP : ₹25,000/-	Choice of Plan : Growth
	Quarterly Dividend	Payout / Reinvestment / Sweep		AP : ₹ 5,000/-	Choice of Option within Monthly Dividend : Dividend Reinvestment
	Growth			FP : ₹5,000/- AP : ₹1,000/-	Choice of Plan within Quarterly Dividend 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 Plan	Daily Dividend Fortnightly Dividend Growth	Reinvestment Payout / Reinvestment	FP : ₹ 10,000/- AP : ₹ 1,000/-	Providend Dividend ≥₹2 Crs Institutional Reinvstmt
			DEBT FUNDS		
Birla Sun Life Medium Term Plan	Institutional Plan	Weekly Dividend Fortnightly Dividend Monthly Dividend	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	Growth		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	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 Weekly Dividend	Payout / Reinvestment	FP : ₹5,00,00,000/-	<₹5 Crs
	Institutional Premium - Growth		Payout / Reinvestment	AP : ₹1,00,000/-	Premium Reinvstmt
Birla Sun Life Dynamic Bond Fund	Retail Plan	Monthly Dividend Sweep ^{\$} 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 Reinvstmt
	Institutional	Growth Weekly Dividend Daily Dividend	Reinvestment Reinvestment	FP : ₹ 1,00,00,000/- AP : ₹ 1,00,000/-	≥ ₹ 1 Cr Institutional Daily Dividend Reinvstmt
Birla Sun Life Government Securities Fund	Long Term	Growth Dividend	Payout / Reinvestment	FP : ₹5,000/- AP : ₹1,000/-	
	Short Term (Retail) Plan	Daily Dividend Growth	Reinvestment	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 Default <₹ 5 Crs
		Daily Dividend Weekly Dividend Growth	Reinvestment Reinvestment	FP : ₹5,000/- AP : ₹1,000/-	Dividend Herrison ≥₹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/- Growth ₹ 5,000/-	Choice of Option : Growth Choice of Option : Growth
	Wealth 25	Monthly Dividend Monthly Payment Growth	Payout / Reinvestment / Sweep	Growin < 5,000/~ AP : ₹ 1,000/~	Choice of Sub-Option within Monthly Dividend Option : Dividend Reinvestment

 $({}^{*}) FP: Fresh \ Purchase; \qquad AP: Additional \ Purchase$

ase \$ Dividend earned under the Scheme may be switched into any other Open-ended Equity Scheme or Balanced Scheme as opted by the Unitholder.

[^]For Institutional Plan under Birla Sun Life Cash Plus, Birla Sun Life Savings Fund, Birla Sun Life Ultra Short Term 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 / Institutional Premium Plan of the schemes, the minimum application amount will be ₹ 50 lacs; for any investment by itself in the same scheme and plan in which the above said group company has already invested; provided that the said company certify that the investing Company is part of the same group. "Group" means as defined under sec 2 (mm) of SEBI (Mutual Funds) Regulations 1996, # Per subscription transaction (including switch-in)