

Distributor/RIA name and ARN/Code	Sub Broker ARN & Name	Sub Broker/Branch/RM Internal Code	EUIIN (Refer note below)	For Office use only
ARN - 3280		SWSA		

I/We confirm that the EUIIN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned.  
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.

I am a First Time Investor in Mutual Fund Industry.  I am an Existing Investor in Mutual Fund Industry.

Sole / First Applicant's Signature Mandatory

### 1. FIRST APPLICANT'S DETAILS

Name of First Applicant (Should match with PAN/Aadhar Card)			Date of Birth (1st Appl / Minor)		
			D D / M M / Y Y Y Y		
Name of Guardian (if minor)/POA/Contact Person		PAN (1st Appl / Guardian)		Date of Birth (Guardian)	
				D D / M M / Y Y Y Y	
AADHAAR No. (1st Appl / Guardian) <input type="checkbox"/> Attach copy (mandatory) CKYC - KIN			On behalf of minor:		
			Date of Birth Proof attached* <input type="checkbox"/>		
PAN of POA <input type="checkbox"/> KYC AADHAAR No. of POA <input type="checkbox"/> Attach copy (mandatory)			Guardian named is:		
			<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Court Appointed		

### 2. CONTACT DETAILS AND CORRESPONDENCE ADDRESS (As per KYC records)

Email ID (in capital)			Address Type (Mandatory)		
			<input type="checkbox"/> a. Residential & Business		
Mobile +91			<input type="checkbox"/> b. Residential		
			<input type="checkbox"/> c. Business		
Tel (STD Code)			<input type="checkbox"/> d. Registered Office		
Address					
Landmark					
City		Pin Code (Mandatory)		State	

### 3. KYC DETAILS (Mandatory)

**3a. Status of Sole/1st Applicant** (Please tick ✓)  Indian Resident Individual  Minor (Resident)  Minor (Repatriable)  Minor (Non Repatriable)  
 NRI (Repatriable)  NRI (Non-Repatriable)  PIO  Sole Proprietorship  HUF - Indian  HUF - NR  Partnership Firm  Limited Partnership (LLP)  Public Ltd. Co.  Private Ltd. Co.  
 Body Corporate  Bank  Fls  Insurance Companies  Government Body  AOP/BOI  Trust  Society  Provident Fund  Superannuation/Pension Fund  Gratuity Fund  Mutual Fund  
 FII  FPI-Category I/II/III  FCRA  GDN  Defence Establishment  NPS Trust  Others \_\_\_\_\_ (Please specify)

Are you a Non-Profit Organization [NPO] or Company u/s 25 (Companies Act 1956) or u/s 8 of Companies, Act, 2013:  Yes  No

**3b. Occupation Details** (Please tick ✓)  Private Sector Service  Public Sector Service  Government Service  Business  Professional  
 Agriculturist  Retired  Housewife  Student  Forex Dealer  Others \_\_\_\_\_ (Please specify)

**3c. Gross Annual Income** (Please tick ✓)  Below 1 Lac  1-5 Lacs  5-10 Lacs  10-25 Lacs  >25 Lacs-1 crore  >1 crore  
**Net-worth in** (Mandatory for Non-Individuals) ₹ \_\_\_\_\_ as on D D / M M / Y Y Y Y (Not older than 1 year)

**3d. For Individuals** (Please tick ✓)  Not Applicable  I am Politically Exposed Person  I am Related to Politically Exposed Person

### 4. JOINT APPLICANTS (IF ANY) DETAILS

**Mode of Holding** (Please tick ✓)  Joint (Default)  Anyone or Survivor

2nd Applicant			Date of Birth		
(Should match with PAN/Aadhar Card)			D D / M M / Y Y Y Y		
PAN		AADHAR NO. <input type="checkbox"/> Attach copy (mandatory)		CKYC - KIN	
<p><b>a. Occupation Details</b> (Please tick ✓) <input type="radio"/> Private Sector Service <input type="radio"/> Public Sector Service <input type="radio"/> Government Service <input type="radio"/> Business <input type="radio"/> Professional  <input type="radio"/> Agriculturist <input type="radio"/> Retired <input type="radio"/> Housewife <input type="radio"/> Student <input type="radio"/> Forex Dealer <input type="radio"/> Others _____ (Please specify)</p> <p><b>b. Gross Annual Income</b> (Please tick ✓) <input type="radio"/> Below 1 Lac <input type="radio"/> 1-5 Lacs <input type="radio"/> 5-10 Lacs <input type="radio"/> 10-25 Lacs <input type="radio"/> &gt;25 Lacs-1 crore <input type="radio"/> &gt;1 crore</p> <p><b>c. Others</b> (Please tick ✓) <input type="radio"/> Not Applicable <input type="radio"/> Politically Exposed Person (PEP) <input type="radio"/> Related to a Politically Exposed Person (PEP)</p>					
3rd Applicant			Date of Birth		
(Should match with PAN/Aadhar Card)			D D / M M / Y Y Y Y		
PAN		AADHAR NO. <input type="checkbox"/> Attach copy (mandatory)		CKYC - KIN	
<p><b>a. Occupation Details</b> (Please tick ✓) <input type="radio"/> Private Sector Service <input type="radio"/> Public Sector Service <input type="radio"/> Government Service <input type="radio"/> Business <input type="radio"/> Professional  <input type="radio"/> Agriculturist <input type="radio"/> Retired <input type="radio"/> Housewife <input type="radio"/> Student <input type="radio"/> Forex Dealer <input type="radio"/> Others _____ (Please specify)</p> <p><b>b. Gross Annual Income</b> (Please tick ✓) <input type="radio"/> Below 1 Lac <input type="radio"/> 1-5 Lacs <input type="radio"/> 5-10 Lacs <input type="radio"/> 10-25 Lacs <input type="radio"/> &gt;25 Lacs-1 crore <input type="radio"/> &gt;1 crore</p> <p><b>c. Others</b> (Please tick ✓) <input type="radio"/> Not Applicable <input type="radio"/> Politically Exposed Person (PEP) <input type="radio"/> Related to a Politically Exposed Person (PEP)</p>					

### ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

DSP BLACKROCK MUTUAL FUND

Received, subject to realisation and verification an application for purchase of Units as mentioned in the application form.  
From \_\_\_\_\_

Application No.

Scheme	Cheque no.	Amount
DSPBR		

## 5. FATCA and CRS DETAILS

Sole/First Applicant/Guardian			2nd Applicant			<input type="checkbox"/> 3rd Applicant <input type="checkbox"/> POA		
Place & Country of Birth	PLACE	COUNTRY	Place & Country of Birth	PLACE	COUNTRY	Place & Country of Birth	PLACE	COUNTRY
Nationality <input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Other _____			Nationality <input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Other _____			Nationality <input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Other _____		

# Please indicate all Countries, other than India, in which you are a resident for tax purpose, associated Taxpayer Identification Number and its Identification type eg. TIN etc.  
 \*If TIN is not available or mentioned, please mention reason as: 'A' if the country does not issue TINs to its residents; 'B' & mention why you are unable to obtain a TIN; 'C' if the authorities of the country of tax residence entered above do not require the TIN to be disclosed.

Country #	Tax Identification Number	Identification Type/Reason*	Country #	Tax Identification Number	Identification Type/Reason*	Country #	Tax Identification Number	Identification Type/Reason*
1			1			1		
2			2			2		
3			3			3		

## 6. BANK ACCOUNT DETAILS (Avail Multiple Bank Registration Facility)

Bank Name \_\_\_\_\_

Bank A/C No. \_\_\_\_\_ A/C Type  Savings  Current  NRE  NRO  FCNR  Others \_\_\_\_\_

Branch Address \_\_\_\_\_

City \_\_\_\_\_ Pin \_\_\_\_\_

IFSC code: (11 digit) \_\_\_\_\_ MICR code (9 digit) \_\_\_\_\_ (This is a 9 digit number next to your cheque number)

## 7. INVESTMENT AND PAYMENT DETAILS (Default plan/option/sub option will be applied incase of no information, ambiguity or discrepancy)

Cheque/DD should be in favour of: "DSP BlackRock Mutual Fund" if single cheque with multiple schemes OR "Scheme Name", in case of single scheme / scheme wise cheques.

One time Lumpsum Investment  SIP: Systematic Investment Plan.  Attach OTM form, if not already registered. Mention First SIP Cheque Details below and in SIP form.

Full Scheme/Plan/Option/Sub Option

Amount (₹)

1. DSPBR -	Scheme	Plan	Option/Sub Option	Amount (₹)	Payment Mode: <input type="checkbox"/> Cheque <input type="checkbox"/> DD
2. DSPBR -	Scheme	Plan	Option/Sub Option		<input type="checkbox"/> RTGS <input type="checkbox"/> NEFT <input type="checkbox"/> Funds transfer
3. DSPBR -	Scheme	Plan	Option/Sub Option		Cheque/DD/RTGS/NEFT Details:
Total				Amount in words	Amount in Figures

Ref. No. \_\_\_\_\_  
 Date DD / MM / YYYY  
 DD charges, if any \_\_\_\_\_

Payment from Bank A/c No. \_\_\_\_\_ Pay In A/c No. \_\_\_\_\_ A/c. Type  Savings  Current  NRE  NRO  FCNR  Others \_\_\_\_\_

Bank Name & Branch \_\_\_\_\_

Documents Attached to avoid Third Party Payment Rejection, where applicable:  Bank Certificate, for DD  Third Party Declarations

## 8. NOMINATION DETAILS

I/We wish to nominate.  I/We DO NOT wish to nominate and sign here \_\_\_\_\_ 1st Applicant Signature (Mandatory)

	Nominee Name	Relationship with applicant	Guardian Name (In case of Minor)	Allocation %	Nominee/ Guardian Signature
Nominee 1					
Nominee 2					
Nominee 3					
Address				Total = 100%	

## 9. UNIT HOLDING OPTION:

In Account Statement Mode (default):  In Demat mode: NSDL: I N \_\_\_\_\_ Depository Participant (DP) ID (NSDL only) \_\_\_\_\_ Enclose for demat option:  Client Master List  Transaction/Holding Statement  DIS Copy

Beneficiary Account Number (NSDL only) \_\_\_\_\_

CDSL: \_\_\_\_\_

## 10. DECLARATION & SIGNATURES

Having read and understood the contents of the Scheme Information Document and Statement of Additional Information, Key Information Memorandum, Instructions and addenda issued by DSP BlackRock Mutual Fund from time to time, I / We, hereby apply to the Trustee of DSP BlackRock Mutual Fund for Units of the relevant Scheme/Plan/Option and agree to abide by the terms and conditions, rules and regulations. I / We have understood the information requirements of the application form, including FATCA and CRS requirements, terms and conditions (read along with instructions and scheme related documents) and hereby accept the same and further confirm that the information provided by me/us on this form is true, correct, and complete. I / We declare that the amount invested in the Scheme is through legitimate sources only and is not designed for the purpose of contravention or evasion of any Act, Regulation, Rule, Notification, Directions or any other applicable laws enacted by the Government of India or any Statutory Authority. I hereby provide my consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/ authenticating and (iii) updating my Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA. I hereby provide my consent for sharing/disclose of the Aadhaar number(s) including demographic information with the asset management companies of SEBI registered intermediaries, their Registrar and Transfer Agents (RTA)/Service Providers for the purpose of updating the same in all my/our folios.

Sole / First Applicant / Guardian

Second Applicant

Third Applicant

POA holder, if any

Email: [service@dspblackrock.com](mailto:service@dspblackrock.com)

Website: [www.dspblackrock.com](http://www.dspblackrock.com)

Contact Centre: 1800 200 4499

Quick Checklist

<input type="checkbox"/> Name, Address are correctly mentioned	<input type="checkbox"/> Full scheme name, plan, option is mentioned	<input type="checkbox"/> Additional documents provided if investor name is not pre-printed on payment cheque or if Demand Draft is used.
<input type="checkbox"/> Email ID / Mobile number are mentioned	<input type="checkbox"/> Pay-In bank details and supportings are attached	<input type="checkbox"/> Non Individual investors should attach
<input type="checkbox"/> KYC information provided for each applicant	<input type="checkbox"/> Nomination facility opted	<input type="checkbox"/> FATCA Details and Declaration Form
<input type="checkbox"/> FATCA/CRS details provided for each applicant	<input type="checkbox"/> Form is signed by all applicants	<input type="checkbox"/> UBO Declaration Form
<input type="checkbox"/> Aadhaar No. and copy is attached for each applicant		

Distributor / RIA Name and ARN / Code	Sub Broker ARN & Name	Sub Broker/Branch/RM Internal Code	EUIIN (Refer note below)	For Office use only
ARN-3280		SWSA		

Name of Sole / First Unitholder (Leave space between first / middle / last name)  Mr.  Ms.  M/s.  Others \_\_\_\_\_ Folio Number \_\_\_\_\_

Scheme Name/Plan/Option\*/Sub Option\* **DSPBR -**

**SYSTEMATIC INVESTMENT PLAN (SIP) POST DATED CHEQUES (PDC)**

(Separate Cheque required for investment in different Scheme / Plan)  
All Cheques should be of same date of the months / quarters.

Each SIP Amount (minimum Rs. 500) \_\_\_\_\_ Rs.

SIP Date  1st  7th  10th  14th  15th  21st  25th  28th

Investment Frequency  Monthly  Quarterly

SIP Period From DD / MM / YY To DD / MM / YY

(Minimum 12 installments, 6 in case of DSPBR TaxSaver Fund)

Cheque Nos. From \_\_\_\_\_ To \_\_\_\_\_

Drawn on Bank \_\_\_\_\_

Branch \_\_\_\_\_ City \_\_\_\_\_

**SYSTEMATIC TRANSFER PLAN (STP) (Please allow 7 days to register STP)**

STP in To Scheme/Plan/Option\*/Sub Option\*

**DSPBR -**

Transfer Amount  Fixed Sum of \_\_\_\_\_ Rs. (Minimum Rs.500/-)

Capital Appreciation, subject to Minimum of Rs.500/-

STP DATES	FREQUENCY
<input type="checkbox"/> 1st* <input type="checkbox"/> 7th <input type="checkbox"/> 10th <input type="checkbox"/> 14th	<input type="checkbox"/> Monthly*
<input type="checkbox"/> 15th <input type="checkbox"/> 21st <input type="checkbox"/> 25th <input type="checkbox"/> 28th	<input type="checkbox"/> Quarterly

OR  Daily

Transfer Period (Period to cover - minimum 6 STP transactions) From DD / MM / YY To DD / MM / YY

Investments done in schemes through STP will be treated as investments through SIP and the load structure for SIP will be applicable. \* Default Option

I/We confirm that the EUIIN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned.

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.

Sole / FirstApplicant's Signature Mandatory

**DIVIDEND TRANSFER PLAN (DTP) - ENROLMENT DETAILS (Please allow 7 days to register DTP) (Refer Terms and Conditions)**

(Please mention complete Scheme, Plan & Option)

Source Scheme (From where Dividend is to be transferred)

**DSPBR -**

To \_\_\_\_\_

Target Scheme (To where Dividend is to be transferred)

**DSPBR -**

**SYSTEMATIC WITHDRAWAL PLAN (SWP) (Please allow 7 days to register SWP)**

Withdrawal Amount  Fixed Sum of \_\_\_\_\_ Rs. (Minimum Rs.500/-)

Capital Appreciation, subject to Minimum of Rs.500/-

Withdrawal Date  1st\*  7th  14th  21st  28th  All five Dates

Frequency  Monthly\*  Quarterly \* Default Option

Withdrawal Period (Period to cover - minimum 6 SWP transactions) From DD / MM / YY To DD / MM / YY

\* Default Option may be applied in case of no information, ambiguity or discrepancy.

**DECLARATION & SIGNATURES (To be signed as per Mode of Holding)**

Having read and understood the contents of the Scheme Information Document and Statement of Additional Information, Key Information Memorandum, Instructions and addenda issued by DSP BlackRock Mutual Fund, I / We, hereby apply to the Trustee of DSP BlackRock Mutual Fund for Units of the relevant Scheme and agree to abide by the terms and conditions, rules and regulations of the Scheme. I / We declare that the amount invested in the Scheme is through legitimate sources only and is not designed for the purpose of contravention or evasion of any Act, Regulation, Rule, Notification, Directions or any other applicable laws enacted by the Government of India or any Statutory Authority. I / We have neither received nor been induced by any rebate or gifts, directly or indirectly in making this investment. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. Applicable to NRIs only: I/We confirm that I am/We are Non-Resident(s) of Indian Nationality. If EUIIN is left blank/not mentioned; I/We hereby confirm that the EUIIN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor and the distributor has not charged any advisory fees on this transaction.

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Sole / First Unit Holder      Second Unit Holder      Third Unit Holder      POA Holder, if any

**INSTRUCTIONS**

This form should be used by existing investors only by mentioning their folio number, name and Scheme details. Please read the Scheme related documents, Addenda, KIM and Instructions there-in and below mentioned instructions carefully before filling up the form. Investors should provide details/instructions only in the designated space provided in the form else the same may not be considered.

**ADDITIONAL PURCHASE & PAYMENT DETAILS:** Investors should fill name of the scheme, plan, option and sub-option. In case the details are not proper and clear or in case of incomplete details, non-clarity or ambiguity, default options will be considered and applied. Where the investor gives separate cheque/s for investments in separate scheme/s, each such cheque should be favouring the scheme name and crossed as Account Payee. Where the investor gives a single consolidated cheque for investments in more than one scheme such cheque should be crossed as Account Payee and drawn in favour of 'DSP BlackRock Mutual Fund'. Where the investor gives a cheque for an amount more than Rs 2 lakhs and wishes to do a fund transfer banking (in the banks supported by the fund) cheque should be drawn in favour of ' DSP BlackRock Mutual Fund Collection Account'.

The first unit holder should be one of the bank account holders in the pay-in bank account. Purchase application through Cheque/DD/RTGS/NEFT/Funds transfer requests should necessarily mention the pay-in bank account details i.e. account number and bank, branch name of the bank account used for issuing the payments to the fund. If this is not evidenced on the payment cheque/funds transfer/RTGS/NEFT request, or in case of demand drafts, unit holder should attach necessary supporting documents as required by the fund, like bank certificate, bank passbook copy or statement to prove that the funds are from a bank account held by first unit holder only. If the documents are not submitted with the application, the fund reserves the right to reject the application or call for additional details. Investors are advised to visit [www.dsblackrock.com](http://www.dsblackrock.com) for details on documents, restrictions on third party payments or approach any of the offices of the fund.

**ADDITIONAL PURCHASE THROUGH OTM FACILITY:** If you are making payment through OTM facility registered in your folio, please tick the relevant box and do not attach any cheque. If more than one bank accounts are registered in your folio under OTM facility, please mention the bank account number and bank name where you wish the debit to happen. If the same is not mentioned or is not registered, default bank mandate under OTM facility will be considered to debit the purchase amount.

**KYC COMPLIANCE:** Investors shall note that KYC is mandatory and they need to comply with the 'Know Your Client' requirements as applicable from time to time. For more information on KYC, please log on to [www.dsblackrock.com](http://www.dsblackrock.com) / [www.amfiindia.com](http://www.amfiindia.com) before investing. Applications are liable to be rejected without any intimation to the applicants, if required KYC compliance is not completed by all the applicants/unit holders.

**REDEMPTION REQUEST:** Redemption may not be processed if folio number and full scheme name including plan and option is not mentioned. Please ensure that either of amount or units is mentioned in the redemption request. The fund offers a facility to register multiple bank accounts and designate one of the bank account as "Default Bank Account". Default Bank Account will be used for all dividends and redemptions payouts including FMP schemes maturity proceeds unless investor specifies one of the existing registered bank account in the redemption request for receiving redemption proceeds. A new non-registered bank account specified in the specific redemption request for receiving redemption proceeds will not be considered. Consequent to introduction of "Multiple Bank Accounts Facility", the existing facility of redemption with change of bank mandate is discontinued by the fund. New bank accounts can only be registered using the designated "Bank Account Registration Form".

**BANK ACCOUNT FOR REDEMPTION PROCEEDS:** Please note the following important points related to payment of redemption proceeds: a) Proceeds of any redemption request will be sent only to a bank account that is already registered and validated in the folio at the time of redemption transaction processing. b) Unit holder(s) may choose to mention any of the existing registered bank accounts with redemption request for receiving redemption proceeds. If no registered bank account is mentioned, default bank account will be used. c) If unit holder(s) provide a new and unregistered bank mandate with a specific redemption request (with or without necessary supporting documents) such bank account will not be considered for payment of redemption proceeds.

**POA REGISTRATION:** Only a General Power of Attorney agreement without any restrictions and perential validity is accepted. The POA must be executed on stamp paper and registered in India and a duly notarized copy should be enclosed. The POA must have signatures of the investor as well the POA holder. If the signature of POA holder is not available, the fund may call for additional documents or declarations on a case to case basis. POA will be registered within 10 working days of receipt of all valid documents.

**SYSTEMATIC INVESTMENT PLAN (SIP) / SYSTEMATIC WITHDRAWAL PLAN (SWP):** Please allow upto 7 days for STP/ SWP to be registered and first STP/ SWP transaction to happen. Hence form should be submitted atleast 7 days before STP / SWP start date. STP/ SWP is available in all the schemes of the Fund. Please note the default options highlighted in the form which will be used in case of incorrect details in the form. For investors availing the transfer/ withdrawal of 'appreciation' option, where in any week, month or quarter, there is no appreciation or is less than Rs.500/-, switch/withdrawal as mentioned above, may not be carried out. You can choose to discontinue this facility by giving 30 days written notice to the Registrar.

**DIVIDEND TRANSFER PLAN (DTP):** Please allow upto 7 days for DTP to be registered. Hence form should be submitted atleast 7 days before the record date of any forthcoming proposed dividend. Please refer to [www.dsblackrock.com](http://www.dsblackrock.com) > Services > Dividend Transfer Plan for list of Source Scheme, Target Schemes and detailed terms and conditions. The Minimum amount of dividend eligible for transfer under Dividend Transfer Plan is Rs. 500/-.

Distributor / RIA Name and ARN / Code	Sub Broker ARN & Name	Sub Broker/Branch/RM Internal Code	EUN (Refer note below)	For Office use only
ARN-3280		SWSA		

Name of Sole / First Unitholder (Leave space between first / middle / last name)  Mr.  Ms.  M/s.  Others \_\_\_\_\_ Folio Number \_\_\_\_\_

Scheme Name/Plan/Option\*/Sub Option\* **DSPBR -**

**SYSTEMATIC INVESTMENT PLAN (SIP) POST DATED CHEQUES (PDC)**

(Separate Cheque required for investment in different Scheme / Plan)  
All Cheques should be of same date of the months / quarters.

Each SIP Amount (minimum Rs. 500) Rs. \_\_\_\_\_

SIP Date  1st  7th  10th  14th  15th  21st  25th  28th

Investment Frequency  Monthly  Quarterly

SIP Period From DD / MM / YY To DD / MM / YY

(Minimum 12 installments, 6 in case of DSPBR TaxSaver Fund)

Cheque Nos. From \_\_\_\_\_ To \_\_\_\_\_

Drawn on Bank \_\_\_\_\_

Branch \_\_\_\_\_ City \_\_\_\_\_

**SYSTEMATIC TRANSFER PLAN (STP) (Please allow 7 days to register STP)**

STP in To Scheme/Plan/Option\*/Sub Option\*

**DSPBR -**

Transfer Amount  Fixed Sum of Rs. \_\_\_\_\_ (Minimum Rs.500/-)

Capital Appreciation, subject to Minimum of Rs.500/-

STP DATES	FREQUENCY
<input type="checkbox"/> 1st* <input type="checkbox"/> 7th <input type="checkbox"/> 10th <input type="checkbox"/> 14th	<input type="checkbox"/> Monthly*
<input type="checkbox"/> 15th <input type="checkbox"/> 21st <input type="checkbox"/> 25th <input type="checkbox"/> 28th	<input type="checkbox"/> Quarterly

OR  Daily

Transfer Period (Period to cover - minimum 6 STP transactions) From DD / MM / YY To DD / MM / YY

Investments done in schemes through STP will be treated as investments through SIP and the load structure for SIP will be applicable. \* Default Option

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(Please mention complete Scheme, Plan & Option)

Source Scheme (From where Dividend is to be transferred)

**DSPBR -**

To

Target Scheme (To where Dividend is to be transferred)

**DSPBR -**

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Withdrawal Amount  Fixed Sum of Rs. \_\_\_\_\_ (Minimum Rs.500/-)

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Withdrawal Date  1st\*  7th  14th  21st  28th  All five Dates

Frequency  Monthly\*  Quarterly \* Default Option

Withdrawal Period (Period to cover - minimum 6 SWP transactions) From DD / MM / YY To DD / MM / YY

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**DECLARATION & SIGNATURES (To be signed as per Mode of Holding)**

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Sole / First Unit Holder \_\_\_\_\_ Second Unit Holder \_\_\_\_\_ Third Unit Holder \_\_\_\_\_ POA Holder, if any \_\_\_\_\_

**INSTRUCTIONS**

This form should be used by existing investors only by mentioning their folio number, name and Scheme details. Please read the Scheme related documents, Addenda, KIM and Instructions there-in and below mentioned instructions carefully before filling up the form. Investors should provide details/instructions only in the designated space provided in the form else the same may not be considered.

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The first unit holder should be one of the bank account holders in the pay-in bank account. Purchase application through Cheque/DD/RTGS/NEFT/Funds transfer requests should necessarily mention the pay-in bank account details i.e. account number and bank, branch name of the bank account used for issuing the payments to the fund. If this is not evidenced on the payment cheque/funds transfer/RTGS/NEFT request, or in case of demand drafts, unit holder should attach necessary supporting documents as required by the fund, like bank certificate, bank passbook copy or statement to prove that the funds are from a bank account held by first unit holder only. If the documents are not submitted with the application, the fund reserves the right to reject the application or call for additional details. Investors are advised to visit [www.dsblackrock.com](http://www.dsblackrock.com) for details on documents, restrictions on third party payments or approach any of the offices of the fund.

**ADDITIONAL PURCHASE THROUGH OTM FACILITY:** If you are making payment through OTM facility registered in your folio, please tick the relevant box and do not attach any cheque. If more than one bank accounts are registered in your folio under OTM facility, please mention the bank account number and bank name where you wish the debit to happen. If the same is not mentioned or is not registered, default bank mandate under OTM facility will be considered to debit the purchase amount.

**KYC COMPLIANCE:** Investors shall note that KYC is mandatory and they need to comply with the 'Know Your Client' requirements as applicable from time to time. For more information on KYC, please log on to [www.dsblackrock.com](http://www.dsblackrock.com) / [www.amfiindia.com](http://www.amfiindia.com) before investing. Applications are liable to be rejected without any intimation to the applicants, if required KYC compliance is not completed by all the applicants/unit holders.

**REDEMPTION REQUEST:** Redemption may not be processed if folio number and full scheme name including plan and option is not mentioned. Please ensure that either of amount or units is mentioned in the redemption request. The fund offers a facility to register multiple bank accounts and designate one of the bank account as "Default Bank Account". Default Bank Account will be used for all dividends and redemptions payouts including FMP schemes maturity proceeds unless investor specifies one of the existing registered bank account in the redemption request for receiving redemption proceeds. A new non-registered bank account specified in the specific redemption request for receiving redemption proceeds will not be considered. Consequent to introduction of "Multiple Bank Accounts Facility", the existing facility of redemption with change of bank mandate is discontinued by the fund. New bank accounts can only be registered using the designated "Bank Account Registration Form".

**BANK ACCOUNT FOR REDEMPTION PROCEEDS:** Please note the following important points related to payment of redemption proceeds: a) Proceeds of any redemption request will be sent only to a bank account that is already registered and validated in the folio at the time of redemption transaction processing. b) Unit holder(s) may choose to mention any of the existing registered bank accounts with redemption request for receiving redemption proceeds. If no registered bank account is mentioned, default bank account will be used. c) If unit holder(s) provide a new and unregistered bank mandate with a specific redemption request (with or without necessary supporting documents) such bank account will not be considered for payment of redemption proceeds.

**POA REGISTRATION:** Only a General Power of Attorney agreement without any restrictions and perential validity is accepted. The POA must be executed on stamp paper and registered in India and a duly notarized copy should be enclosed. The POA must have signatures of the investor as well the POA holder. If the signature of POA holder is not available, the fund may call for additional documents or declarations on a case to case basis. POA will be registered within 10 working days of receipt of all valid documents.

**SYSTEMATIC INVESTMENT PLAN (SIP) / SYSTEMATIC WITHDRAWAL PLAN (SWP):** Please allow upto 7 days for STP/ SWP to be registered and first STP/ SWP transaction to happen. Hence form should be submitted atleast 7 days before STP / SWP start date. STP/ SWP is available in all the schemes of the Fund. Please note the default options highlighted in the form which will be used in case of incorrect details in the form. For investors availing the transfer/ withdrawal of 'appreciation' option, where in any week, month or quarter, there is no appreciation or is less than Rs.500/-, switch/withdrawal as mentioned above, may not be carried out. You can choose to discontinue this facility by giving 30 days written notice to the Registrar.

**DIVIDEND TRANSFER PLAN (DTP):** Please allow upto 7 days for DTP to be registered. Hence form should be submitted atleast 7 days before the record date of any forthcoming proposed dividend. Please refer to [www.dsblackrock.com](http://www.dsblackrock.com) > Services > Dividend Transfer Plan for list of Source Scheme, Target Schemes and detailed terms and conditions. The Minimum amount of dividend eligible for transfer under Dividend Transfer Plan is Rs. 500/-.

Distributor / RIA Name and ARN / Code	Sub Broker ARN & Name	Sub Broker/Branch/RM Internal Code	EUN (Refer note below)	For Office use only
ARN-3280		SWSA		

Name of Sole / First Unitholder (Leave space between first / middle / last name)  Mr.  Ms.  M/s.  Others \_\_\_\_\_ Folio Number \_\_\_\_\_

Scheme Name/Plan/Option\*/Sub Option\* **DSPBR -**

**SYSTEMATIC INVESTMENT PLAN (SIP) POST DATED CHEQUES (PDC)**

(Separate Cheque required for investment in different Scheme / Plan)  
All Cheques should be of same date of the months / quarters.

Each SIP Amount (minimum Rs. 500) Rs. \_\_\_\_\_

SIP Date  1st  7th  10th  14th  15th  21st  25th  28th

Investment Frequency  Monthly  Quarterly

SIP Period From DD / MM / YY To DD / MM / YY

(Minimum 12 installments, 6 in case of DSPBR TaxSaver Fund)

Cheque Nos. From \_\_\_\_\_ To \_\_\_\_\_

Drawn on Bank \_\_\_\_\_

Branch \_\_\_\_\_ City \_\_\_\_\_

**SYSTEMATIC TRANSFER PLAN (STP) (Please allow 7 days to register STP)**

STP in To Scheme/Plan/Option\*/Sub Option\*

**DSPBR -**

Transfer Amount  Fixed Sum of Rs. \_\_\_\_\_ (Minimum Rs.500/-)

Capital Appreciation, subject to Minimum of Rs.500/-

STP DATES	FREQUENCY
<input type="checkbox"/> 1st* <input type="checkbox"/> 7th <input type="checkbox"/> 10th <input type="checkbox"/> 14th	<input type="checkbox"/> Monthly*
<input type="checkbox"/> 15th <input type="checkbox"/> 21st <input type="checkbox"/> 25th <input type="checkbox"/> 28th	<input type="checkbox"/> Quarterly

OR  Daily

Transfer Period (Period to cover - minimum 6 STP transactions) From DD / MM / YY To DD / MM / YY

Investments done in schemes through STP will be treated as investments through SIP and the load structure for SIP will be applicable. \* Default Option

I/We confirm that the EUN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned.

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.

Sole / FirstApplicant's Signature Mandatory

**DIVIDEND TRANSFER PLAN (DTP) - ENROLMENT DETAILS (Please allow 7 days to register DTP) (Refer Terms and Conditions)**

(Please mention complete Scheme, Plan & Option)

Source Scheme (From where Dividend is to be transferred)

**DSPBR -**

To

Target Scheme (To where Dividend is to be transferred)

**DSPBR -**

**SYSTEMATIC WITHDRAWAL PLAN (SWP) (Please allow 7 days to register SWP)**

Withdrawal Amount  Fixed Sum of Rs. \_\_\_\_\_ (Minimum Rs.500/-)

Capital Appreciation, subject to Minimum of Rs.500/-

Withdrawal Date  1st\*  7th  14th  21st  28th  All five Dates

Frequency  Monthly\*  Quarterly \* Default Option

Withdrawal Period (Period to cover - minimum 6 SWP transactions) From DD / MM / YY To DD / MM / YY

\* Default Option may be applied in case of no information, ambiguity or discrepancy.

**DECLARATION & SIGNATURES (To be signed as per Mode of Holding)**

Having read and understood the contents of the Scheme Information Document and Statement of Additional Information, Key Information Memorandum, Instructions and addenda issued by DSP BlackRock Mutual Fund, I / We, hereby apply to the Trustee of DSP BlackRock Mutual Fund for Units of the relevant Scheme and agree to abide by the terms and conditions, rules and regulations of the Scheme. I / We declare that the amount invested in the Scheme is through legitimate sources only and is not designed for the purpose of contravention or evasion of any Act, Regulation, Rule, Notification, Directions or any other applicable laws enacted by the Government of India or any Statutory Authority. I / We have neither received nor been induced by any rebate or gifts, directly or indirectly in making this investment. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. Applicable to NRIs only: I/We confirm that I am/We are Non-Resident(s) of Indian Nationality. If EUN is left blank/not mentioned; I/We hereby confirm that the EUN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor and the distributor has not charged any advisory fees on this transaction.

Sole / First Unit Holder	Second Unit Holder	Third Unit Holder	POA Holder, if any
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**INSTRUCTIONS**

This form should be used by existing investors only by mentioning their folio number, name and Scheme details. Please read the Scheme related documents, Addenda, KIM and Instructions there-in and below mentioned instructions carefully before filling up the form. Investors should provide details/instructions only in the designated space provided in the form else the same may not be considered.

**ADDITIONAL PURCHASE & PAYMENT DETAILS:** Investors should fill name of the scheme, plan, option and sub-option. In case the details are not proper and clear or in case of incomplete details, non-clarity or ambiguity, default options will be considered and applied. Where the investor gives separate cheque/s for investments in separate scheme/s, each such cheque should be favouring the scheme name and crossed as Account Payee. Where the investor gives a single consolidated cheque for investments in more than one scheme such cheque should be crossed as Account Payee and drawn in favour of 'DSP BlackRock Mutual Fund'. Where the investor gives a cheque for an amount more than Rs 2 lakhs and wishes to do a fund transfer banking (in the banks supported by the fund) cheque should be drawn in favour of ' DSP BlackRock Mutual Fund Collection Account'.

The first unit holder should be one of the bank account holders in the pay-in bank account. Purchase application through Cheque/DD/RTGS/NEFT/Funds transfer requests should necessarily mention the pay-in bank account details i.e. account number and bank, branch name of the bank account used for issuing the payments to the fund. If this is not evidenced on the payment cheque/funds transfer/RTGS/NEFT request, or in case of demand drafts, unit holder should attach necessary supporting documents as required by the fund, like bank certificate, bank passbook copy or statement to prove that the funds are from a bank account held by first unit holder only. If the documents are not submitted with the application, the fund reserves the right to reject the application or call for additional details. Investors are advised to visit [www.dsblackrock.com](http://www.dsblackrock.com) for details on documents, restrictions on third party payments or approach any of the offices of the fund.

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**KYC COMPLIANCE:** Investors shall note that KYC is mandatory and they need to comply with the 'Know Your Client' requirements as applicable from time to time. For more information on KYC, please log on to [www.dsblackrock.com](http://www.dsblackrock.com) / [www.amfiindia.com](http://www.amfiindia.com) before investing. Applications are liable to be rejected without any intimation to the applicants, if required KYC compliance is not completed by all the applicants/unit holders.

**REDEMPTION REQUEST:** Redemption may not be processed if folio number and full scheme name including plan and option is not mentioned. Please ensure that either of amount or units is mentioned in the redemption request. The fund offers a facility to register multiple bank accounts and designate one of the bank account as "Default Bank Account". Default Bank Account will be used for all dividends and redemptions payouts including FMP schemes maturity proceeds unless investor specifies one of the existing registered bank account in the redemption request for receiving redemption proceeds. A new non-registered bank account specified in the specific redemption request for receiving redemption proceeds will not be considered. Consequent to introduction of "Multiple Bank Accounts Facility", the existing facility of redemption with change of bank mandate is discontinued by the fund. New bank accounts can only be registered using the designated "Bank Account Registration Form".

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**SYSTEMATIC INVESTMENT PLAN (SIP) / SYSTEMATIC WITHDRAWAL PLAN (SWP):** Please allow upto 7 days for STP/ SWP to be registered and first STP/ SWP transaction to happen. Hence form should be submitted atleast 7 days before STP / SWP start date. STP/ SWP is available in all the schemes of the Fund. Please note the default options highlighted in the form which will be used in case of incorrect details in the form. For investors availing the transfer/ withdrawal of 'appreciation' option, where in any week, month or quarter, there is no appreciation or is less than Rs.500/-, switch/withdrawal as mentioned above, may not be carried out. You can choose to discontinue this facility by giving 30 days written notice to the Registrar.

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**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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**Investor Name:**

**Mutual Fund / AMC Name:**

**Folio No. :**

**PAN (1st Holder) :**

<b>Switch Request:</b>	
I /We wish to Switch Rs. _____	Or _____ Units
From Scheme:	
To Scheme:	

*I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor and the distributor has not charged any advisory fees on this transaction".  
If my/our unit/amount balance is inadequate to meet the request, I/We authorize you to switch out available units subject to minimum amount requirements of the Switch-In scheme.*

*I/We have read and understood the contents of the Scheme Information Document(s), Key Information Memorandum and Addenda issued for the respective scheme(s). I/We hereby apply to the Trustee of the Mutual Fund and agree to abide by the terms and conditions, rules and regulations of the relevant scheme(s)/Mutual Fund(s). I/We have neither received nor been induced by any rebate or gifts, directly or indirectly in making this investment. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable for the different competing Schemes of various Mutual Funds from amongst which this Scheme is being recommended to me/us. I/We hereby confirm that I/we have not been offered / communicated any indicative portfolio and/or any indicative yield by the respective Mutual Fund / its distributor for this investment. I/We am/are authorized to undertake this transaction.*

*Any other advisory charges shall be paid directly by the investor to the ARN Holder (AMFI registered Distributor) based on the investors' assessment of various factors including the service rendered by the ARN Holder.*

*Note: Redemption/Switching of units is subject to realization of funds in the scheme by way of payment instrument / transfer or switch-in funding process.*



Signature (1st Holder)

Signature (2nd Holder)

Signature (3rd Holder)

**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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**Switch Transaction Form**

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**Switch Transaction Form**

Date: \_\_\_\_\_

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Date: \_\_\_\_\_

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I /We wish to Switch Rs. _____		Or _____ Units	
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Signature (1st Holder)

Signature (2nd Holder)

Signature (3rd Holder)

**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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**Investor Name:**

**Mutual Fund / AMC Name:**

**Folio No:**

**PAN (1st Holder):**

<b>Switch Request:</b>			
I /We wish to Switch Rs. _____		Or _____ Units	
From	Scheme:		
To	Scheme:		

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Signature (1st Holder)

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Signature (3rd Holder)



**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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If my/our unit/amount balance is inadequate to meet the request, I/We authorize you to switch out available units subject to minimum amount requirements of the Switch-In scheme.*

*I/We have read and understood the contents of the Scheme Information Document(s), Key Information Memorandum and Addenda issued for the respective scheme(s). I/We hereby apply to the Trustee of the Mutual Fund and agree to abide by the terms and conditions, rules and regulations of the relevant scheme(s)/Mutual Fund(s). I/We have neither received nor been induced by any rebate or gifts, directly or indirectly in making this investment. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable for the different competing Schemes of various Mutual Funds from amongst which this Scheme is being recommended to me/us. I/We hereby confirm that I/we have not been offered / communicated any indicative portfolio and/or any indicative yield by the respective Mutual Fund / its distributor for this investment. I/We am/are authorized to undertake this transaction.*

*Any other advisory charges shall be paid directly by the investor to the ARN Holder (AMFI registered Distributor) based on the investors' assessment of various factors including the service rendered by the ARN Holder.*

*Note: Redemption/Switching of units is subject to realization of funds in the scheme by way of payment instrument / transfer or switch-in funding process.*



Signature (1st Holder)

Signature (2nd Holder)

Signature (3rd Holder)

**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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**Investor Name:**

**Mutual Fund / AMC Name:**

**Folio No:**

**PAN (1st Holder):**

<b>Switch Request:</b>			
I /We wish to Switch Rs. _____		Or _____ Units	
From	Scheme:		
To	Scheme:		

*I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor and the distributor has not charged any advisory fees on this transaction".  
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Signature (3rd Holder)

**Switch Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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Signature (1st Holder)

Signature (2nd Holder)

Signature (3rd Holder)

**Redemption Transaction Form**

Date: \_\_\_\_\_

<b>ARN: 3280</b> Sundaram Finance Limited	<b>Sub Broker ARN:</b> -----	<b>Sub Agent Code:</b> SWSA	<b>EUIN:</b>
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Investor Name:

Mutual Fund / AMC Name:

Folio No. :

PAN (1st Holder) :

<b>Redemption Request:</b> I /We wish to redeem Rs. _____ Or _____ Units From Scheme:
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**Caution:**Please ensure that your bank details already registered in the Folio are correct and updated. If not, kindly comply with the formalities for Change of Bank details before proceeding with the Redemption of units.

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