

**Know Your Client (KYC)
Application Form (For Individuals only)**(Please fill the form in English and in BLOCK Letters)
Fields marked with ** are mandatory fieldsApplication ☐ NewType* ☐ Update KYC Number* KYC Type* ☐ Normal (PAN is mandatory) ☐ PAN Exempt Investors (Refer instruction K)**1. Identity Details** (Please refer instruction A at the end)PAN

Please enclose a duly attested copy of your PAN Card

Prefix

First Name

Middle Name

Last Name

Name* (same as ID proof)

Maiden Name (If any*)

Father / Spouse Name*

Mother Name*

Date of Birth*

 - -

Gender*

☐ M- Male☐ F- Female☐ T-Transgender

Marital Status*

☐ Married☐ Unmarried☐ Others

Citizenship*

☐ IN- Indian☐ Others – Country Country Code

Residential Status*

☐ Resident Individual☐ Non Resident Indian☐ Foreign National☐ Person of Indian Origin

Occupation Type*

☐ S-Service ☐ Private Sector☐ Public Sector☐ Government Sector☐ O-Others ☐ Professional☐ Self Employed☐ Retired☐ Housewife☐ Student☐ B-Business☐ X-Not Categorised

Photo

Signature/
Thumb Impression**2. Proof of Identity (Pol)*** (for PAN exempt Investor or if PAN card copy not provided) (Please refer instruction C & K at the end)(Certified copy of any one of the following Proof of Identity [Pol] needs to be submitted)☐ A- Passport Number

Passport Expiry Date

 - ☐ B- Voter ID Card☐ D- Driving Licence

Driving Licence Expiry Date

 - ☐ E- Aadhaar Card☐ F- NREGA Job Card☐ Z- Others (any document notified by the central government) Identification Number **3. Proof of Address (PoA)***☐ 3.1 Current / Permanent / Overseas Address Details (Please see instruction D at the end)**Address**

Line 1*

Line 2

Line 3

City / Town / Village*

District*

Zip / Post Code*

State/UT Code

 as per Indian Motor Vehicle Act, 1988State/UT* Country* Country Code as per ISO 3166

Address Type*

☐ Residential / Business☐ Residential☐ Business☐ Registered Office☐ Unspecified(Certified copy of any one of the following Proof of Address [PoA] needs to be submitted)

Proof of Address*

☐ Passport Number

Passport Expiry Date

 - ☐ Voter ID Card☐ Driving Licence

Driving Licence Expiry Date

 - ☐ Aadhaar Card☐ NREGA Job Card☐ Others (any document notified by the central government) Identification Number ☐ 3.2 Correspondence / Local Address Details* (Please see instruction E at the end)

Same as Current / Permanent / Overseas Address details (In case of multiple correspondence / local addresses, please fill 'Annexure A1', Submit relevant documentary proof)

Line 1*

Line 2

Line 3

City / Town / Village*

District*

Zip / Post Code*

State/UT Code

 as per Indian Motor Vehicle Act, 1988State/UT* Country* Country Code as per ISO 3166

Email ID																																		
Mobile			-								Tel. (Off)				-								Tel. (Res)				-							

Address Line 1*																																			
Line 2																																			
Line 3																										City / Town / Village*									
District*											Zip / Post Code*															State/UT Code					<input type="checkbox"/> as per Indian Motor Vehicle Act, 1988				
State/UT*											Country*															Country Code					<input type="checkbox"/> as per ISO 3166				

<input type="checkbox"/> Related Person	<input type="checkbox"/> Deletion of Related Person	KYC Number of Related Person (if available*)													
Related Person Type*	<input type="checkbox"/> Guardian of Minor	<input type="checkbox"/> Assignee	<input type="checkbox"/> Authorized Representative												
Name*	Prefix	First Name	Middle Name	Last Name											
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>											
(If KYC number and name are provided, below details of section 6 are optional)															

<input type="checkbox"/> A- Passport Number	<table border="1" style="display: inline-table; width: 150px; height: 20px;"></table>	Passport Expiry Date	<table border="1" style="display: inline-table; width: 100px; height: 20px;"></table>
<input type="checkbox"/> B- Voter ID Card	<table border="1" style="display: inline-table; width: 200px; height: 20px;"></table>		
<input type="checkbox"/> C- PAN Card	<table border="1" style="display: inline-table; width: 150px; height: 20px;"></table>		
<input type="checkbox"/> D- Driving Licence	<table border="1" style="display: inline-table; width: 200px; height: 20px;"></table>	Driving Licence Expiry Date	<table border="1" style="display: inline-table; width: 100px; height: 20px;"></table>
<input type="checkbox"/> E- Aadhaar Card	<table border="1" style="display: inline-table; width: 150px; height: 20px;"></table>		
<input type="checkbox"/> F- NREGA Job Card	<table border="1" style="display: inline-table; width: 200px; height: 20px;"></table>		
<input type="checkbox"/> Z- Others (any document notified by the central government)	<table border="1" style="display: inline-table; width: 150px; height: 20px;"></table>	Identification Number	<table border="1" style="display: inline-table; width: 150px; height: 20px;"></table>

[illegible]

Signature / Thumb Impression of Applicant

NACH/ECS/AUTO DEBIT
MANDATE INSTRUCTION FORM

UMRN

Date

D

D

M

M

Y

Y

Y

Y

Tick (✓)

CREATE

MODIFY

CANCEL

Sponsor Bank CodeUtility Code

I/We hereby authorize

BSE Limited

to debit (tick ✓)

SB/CA/CC/SB-NRE/SB-NRO/Other

Bank a/c number

with BankIFSCor MICR

an amount of Rupees₹

FREQUENCY

☐ Mthly

☐ Qtly

☐ H-Yrly

☐ Yrly

☒ As & when presented

DEBIT TYPE

☐ Fixed Amount

☒ Maximum Amount

Reference 1 (Mandate Reference No.)Phone No.Reference 2 (Unique Client Code-UCC)Email ID

I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of the bank.

PERIOD

From

D

D

M

M

Y

Y

Y

Y

To

D

D

M

M

Y

Y

Y

Y

Or

☐ Until Cancelled

1.2.3.

- This is to confirm that the declaration has been carefully read, understood & made by me/us. I am authorizing the user entity/ Corporate to debit my account, based on the instructions as agreed and signed by me.
- I have understood that I am authorised to cancel/amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / Corporate or the bank where I have authorized the debit.

Broker/Agent Code ARN		ARN -	
SUB-BROKER	XXXXXXX	EUIN	

Name of the First Applicant :				
PAN Number :		KYC :		Date Of Birth :
Name of Guardian:			PAN:	
Contact Address:				
City:	Pincode:	State:	Country:	
Tel.(Off):	Tel.(Res):		Email:	
Fax(Off):	Fax(Res):		Mobile:	
Mode of Holding:			Occupation:	
Name of the Second Applicant :				
PAN Number :		KYC :		Date Of Birth :
Name of the Third Applicant :				
PAN Number :		KYC :		Date Of Birth :
Other Details of Sole / 1st Applicant				
Overseas Address(In case of NRI Investor):				
City:	Pincode:	Country:		
Bank Mandate Details	Name of Bank:		Branch:	
A/C No.:	A/C Type:	IFSC Code:		
Bank Address:				
City:	Pincode:	State:	Country:	
Nomination Details	Nominee Name:			Relationship:
Guardian Name(If Nominee is Minor):				
Nominee Address:				
City:	Pincode:	State:		
Declaration and Signature - I/We confirm that details provided by me/us are true and correct. The ARN holder has disclosed to me/us all the commission (In the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Fund From amongst which the schemes being recommended to me/us.				
1st applicant Signature :	2nd applicant Signature :	3rd applicant Signature :	Date :	Place :
<p>---Place for Cancelled Cheque, for Single Page Scan---</p>				