

## CHANGE OF BANK MANDATE - FOR SIP

### 1 APPLICANT'S PERSONAL DETAILS (MANDATORY)

Folio No. (For Existing Unit holders)

Sole / 1st Unitholder (as in PAN card/KYC records) First Name  Middle Name  Last Name

Guardian's Name (in case of minor)

PAN No  1st Applicant  2nd Applicant  3rd Applicant

### 2 EXISTING SIP DETAILS (MANDATORY)

Scheme Name  Plan  Option

SIP frequency (tick ✓ any one)  Monthly  Yearly SIP Due Date  SIP period from  to  Maximum period of validity of this mandate is 40 Years only.

SIP Amount (figures) ₹  (words)

### 3 NEW BANK DETAILS

Bank Name

Bank A/c No.  Type  Current  Savings  NRO  NRE  FCNR  Others

Branch Name  City  Pin

IFSC Code (11 digit)\*  MICR Code (9 digit)\*  \*Mentioned on your cheque leaf

### 4 DECLARATION AND SIGNATURE (To be signed by ALL UNIT HOLDERS if mode of holding is 'joint')

I / We declare that the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account towards payment of SIP instalments through an Electronic Debit arrangement / NACH (National Automated Clearing House). If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/we would not hold the user institution responsible. I/We will also inform Axis Mutual Fund about any changes in my bank account.

This is to inform you that I/We have registered for making payment towards my investments in AXISMF by debit to my/our account directly or through ECS (Debit Clearing) / NACH (National Automated Clearing House). I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form. Further, I authorize my representative (the bearer of this request) to get the above Mandate verified. Mandate verification charges, if any, may be charged to my/our account.

I also hereby agree to read the respective SID and SAI of the mutual fund before investing in any scheme of Axis Mutual Fund using this facility.

X	Sole/ 1st Unit Holder / POA	
X	2nd Unit Holder	
X	3rd Unit Holder	

### 5 OLD BANK DETAILS

I / We hereby request Axis Mutual fund to cancel the SIP installments registered. If the cancellation of SIP is delayed or not effected at all for reasons of incomplete or incorrect information, I/ we would not hold the user institution responsible.

Folio No.  IH No.

Scheme Name/ Plan/ Option

SIP Amount (figures) ₹  (words)

Bank Name

Bank A/c No.  Type  Current  Savings  NRO  NRE  FCNR  Others

Branch Name  City  Pin

IFSC Code (11 digit)\*  MICR Code (9 digit)\*  \*Mentioned on your cheque leaf

x Sole/ 1st Unit Holder / POA	x 2nd Unit Holder	x 3rd Unit Holder
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	UMRN <input type="text"/>	Bank use <input type="text"/>	Date <input type="text"/>
<b>Tick (✓)</b>	Sponsor Bank Code <input type="text"/>	Utility Code <input type="text"/>	Bank use <input type="text"/>
CREATE <input checked="" type="checkbox"/>	I/We hereby authorize <b>Axis Mutual Fund</b> to debit (tick ✓) <input type="checkbox"/> SB <input type="checkbox"/> CA <input type="checkbox"/> CC <input type="checkbox"/> SB-NRE <input type="checkbox"/> SB-NRO <input type="checkbox"/> Other		
MODIFY <input type="checkbox"/>	Bank a/c number <input type="text"/>		
CANCEL <input type="checkbox"/>			

with Bank  Name of customers bank  IFSC  or MICR

an amount of Rupees  In Words  ₹  In Figures

FREQUENCY  Mthly  Qtly  H-Yrly  Yrly  As & when presented DEBIT TYPE  Fixed Amount  Maximum Amount

Reference 1  PAN No.  Phone No.

Reference 2  All Schemes of Axis Mutual Fund Email ID

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

<b>PERIOD</b>		
From <input type="text"/>	1. <input type="text"/>	2. <input type="text"/>
To <input type="text"/>	Name as in bank records	Name as in bank records
Maximum period of validity of this mandate is 40 years only	3. <input type="text"/>	Name as in bank records

This is to confirm that the declaration (as mentioned overleaf) 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 authorized 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.

**MANDATORY FIELDS :** • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date • Account holder signature • Account holder name as per bank records

## IN-PERSON VERIFICATION (IPV)

Dear Sir/ Madam,

Folio No.(s) (Mandatory)

I/we would like to add the Bank Mandate for which I/we confirm having submitted the required documents to the AMC/RTA on date

But I am unable to provide the documents towards existing bank mandate whose details are provided below.

### Existing Bank Account Details

Bank Name

Branch Name  Account No.

Account Type  IFSC code

Since, I/we do not have existing bank mandate proof, I/we have personally visited  AMC branch on date

for IPV and I request you to process the bank mandate.

Thanking You,  
Yours faithfully,

	First Holder	Second Holder	Thrid Holder
<b>Name</b>			
<b>Contact No.</b>			
<b>Signature</b>			

**Note :** In case of non-availability of existing bank proof, in-person verification (IPV) is mandatory. The investor must visit the nearest Axis AMC branch service centre for IPV. For IPV, the investor needs to provide the original and self-attested copies of their PAN card as per the applicable mode of holding, or a photo identity proof for PAN-exempt investors, such as a passport, voter ID, ration card, or driving license.

### FOR OFFICE USE ONLY

ID Verified in Original vide no:

Verified By  Name of Employee

Designation

Emp. Code

Signature

### NOTE

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| <p>1. If photocopies of the above documents are submitted, the unit holder must present the originals for verification at any Axis AMC branch or official point of acceptance of transactions.</p> <p>2. The name printed on the documents must match the name on the folio.</p> | <p>3. The AMC reserves the right to accept the request, subject to additional verifications, production of additional documents, or in-person verification of the unit holder.</p> <p>4. A Core Banking System (CBS) account is mandatory.</p> |
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## INSTRUCTIONS

1. The Application Form should be completed in ENGLISH and in BLOCK LETTERS only.
2. Overwriting or using white ink is not allowed. Mandate will be rejected.
3. Applications incomplete in any respect are liable to be rejected. AMC / RTA shall have absolute discretion to reject any such Application Forms.
4. Please submit this form at least 21 days before the desired effective SIP Installment date.
5. Please submit this form along with a copy of a cancelled cheque of the new bank.
6. This form is to be filled for Change of Bank for SIP only. This does not change your bank account details for redemption or dividend payout. In order to change your bank account details for payout, please fill "Change in Bank Account Contact Details" available on the website.
7. If there are multiple SIPs under the same folio, please fill a separate form for each SIP.
8. SIP details like Scheme, and option including, the SIP amount, date, frequency and SIP end date shall remain same.
9. Mandatory fields for filling the mandate. In case any of these fields are not filled mandate will be rejected.
  - Instrument date • Account type • Bank account number • Bank name • IFSC and MICR Code (As per the cheque book/Passbook) • Maximum amount (in words and in figures) • SIP start date • End date to be selected • Signatures as per bank records • Name as per bank records.
10. Existing SIP will be discontinued irrespective of the new SIP gets rejected due to banker rejection.
11. Existing SIP will continue if the Change of Bank for SIP request is rejected if the request is found not in good order.
12. The SIP will be discontinued automatically if payment is not received for three successive installments.
13. Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
14. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
15. Axis Mutual Fund reserves the right to reject any application without assigning any reason thereof. Axis Mutual Fund in consultation with Trustees reserves the right to withdraw these offerings, modify the procedure, frequency, dates, load structure in accordance with the SEBI Regulations and any such change will be applicable only to units transacted pursuant to such change on a prospective basis.