

SERVICE REQUEST Form - SIP / STRIP / SWP

PERSONAL DETAILS

TIME STAMP

First / Sole Holder Name
Folio No.

CHANGE IN SIP ☐ Scheme ☐ Amount(₹) ☐ Date

Please arrange to Change the Scheme / Amount / Date of SIP from existing scheme / Amount / Date as per following details.

SIP Ref (IH No.)

From Scheme Plan Option

To Scheme Plan Option

Existing SIP Amount(₹) New SIP Amount(₹)

Existing SIP Date New SIP Date

(The request must be submitted at least 10 calendar days prior to the SIP debit due date.)

SIP Pause: ☐ Monthly ☐ Quarterly SIP Ref (IH No.)

Scheme Name Plan Option

I/We wish to Pause the above SIP for Month(s) Quarter(s).

(The request must be submitted at least 10 calendar days prior to the SIP debit due date.)

CANCELLATION OF ☐ SIP ☐ SIP STEP UP

Please arrange to cancel my SIP as per following details. I/ We also authorise you to send this instruction to my banker.
In case of cancellation of SIP STEP UP I/ We understand that the last stepped up amount will continue for the rest of SIP tenure.

SIP Ref (IH No.) SIP date

Scheme Plan Option

CHANGE IN STRIP / CANCELLATION OF STRIP ☐ Scheme ☐ Amount(₹) ☐ Date STRIP Ref (IH No.)

Please arrange to cancel my STRIP registered in your records as per following details.

Source Scheme Plan Option

Target Scheme Plan Option

Old STRIP Amount (₹) New STRIP Amount (₹)

☐ Existing STRIP Date New STRIP Date

(The request must be submitted at least 5 calendar days prior to the SIP debit due date.)

CHANGE IN SWP / CANCELLATION OF SWP ☐ Scheme ☐ Amount(₹)

SWP Ref (IH No.) (Refer to SOA for IH No.)

Existing SWP Scheme New SWP Scheme

Existing Amount (₹) New Amount (₹)

(The request must be submitted at least 5 calendar days prior to the SIP debit due date.)

First / Sole Applicant/ Guardian

Second Applicant

Third Applicant

ACKNOWLEDGEMENT SERVICE REQUEST Form - SIP / STRIP / SWP

Received, Subject to verification, request for Cancellation of SIP / SIP Step Up / STRIP/ SWP
or Change In SIP/ STRIP / SWP

from Mr/ Mrs/ Ms :

Folio No :

TIME STAMP

TERMS AND CONDITIONS OF - SIP PAUSE FACILITY

1. Pause is applicable to all Schemes except ULIP.
2. Pause facility will be available for Monthly or Quarterly Frequency.
3. Pause is applicable to all SIP modes except the mandates registered under Standing Instruction Mode with Direct Debit Banks.
4. Pause can be registered only after successful completion of 6 instalments from the date of SIP registration.
5. Pause can be registered for a minimum of 1 Month and a maximum of 6 Months for Monthly Frequency and Minimum of 1 Quarter and Maximum of 2 Quarters respectively for Quarterly Frequency.
6. Pause can be opted for a maximum of 2 times during the entire tenure of SIP.
7. If Pause period coincides with Step Up registered in the SIP, the Stepped amount will be debited after the closure of the Pause Period.
8. Pause Request must be provided at least 10 days before the next SIP debit due date.
9. SIP debit will automatically resume after the completion of the Pause period.