

COMMON APPLICATION FORM

Investment Advisor's Name & ARN	Sub-Broker's Name & ARN Sub-Broker \ LG Code	Official Acceptance Point	Bank Sr. No.	Appl. CA
9451		LG	Stamp & Sign	Date : DD / MM / YYYY

Upfront commission shall be paid directly by the investor to the AMFI registered distributors based on the investor's assessment of various factors including the service rendered by the distributor.

1. EXISTING UNITHOLDER INFORMATION [Refer Guideline 2(a)]

If you have, at any time, invested in any Scheme of Kotak Mahindra Mutual Fund and wish to hold your present investment in the same Account, please furnish your Name, Folio Number and PAN details below and proceed to Section 4.

Name of Sole / First Holder: Folio No.:

2. NEW APPLICANT'S PERSONAL INFORMATION [Refer Guideline 2]

SOLE/FIRST APPLICANT

Name: Date of Birth:

GUARDIAN (in case Sole / First Applicant is a minor)

Name:

CONTACT PERSON (in case of Non-individual applicants)

Name: Designation:

SECOND APPLICANT (Joint Holder 1)

Name:

THIRD APPLICANT (Joint Holder 2)

Name:

MODE OF OPERATION (where there is more than one applicant)

First Holder only Anyone or Survivor Joint

PAN AND KYC COMPLIANCE STATUS DETAILS (Mandatory)

PAN	PAN	PAN
Sole / First Applicant	Second Applicant	Third Applicant
KYC Compliance Status*	KYC Compliance Status*	KYC Compliance Status*
<input type="checkbox"/> PAN Proof # <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> PAN Proof # <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> PAN Proof # <input type="checkbox"/> Yes <input type="checkbox"/> No

(#Please attach PAN Card Copy) / (*KYC allotment letter copy is mandatory for investment => Rs. 50,000/-)

Status (Please ✓)

- Resident Individual
- NRI on Repatriation Basis
- NRI on Non-Repatriation Basis
- HUF
- Proprietorship
- Partnership Firm
- Private Limited Company
- Public Limited Company
- Mutual Fund
- Mutual Fund FOF Scheme
- Body Corporate
- Registered Society
- PF/Gratuity/Pension/ Superannuation Fund
- Trust AOP / BOI
- Foreign Institutional Investor
- On behalf of Minor
- Other _____ (Please specify)

Occupation (Please ✓) (Mandatory)

- Business
- Service
- Professional
- Retired
- Housewife
- Student
- Agricultur
- Other _____ (Please specify)

ADDRESS FOR COMMUNICATION (Mandatory)

City: Pin Code: State: (Cell):

E-mail: Tel.: (Fax):

OVERSEAS ADDRESS (Mandatory for Non-Resident applicants) Address for Correspondence (Please ✓) Indian Overseas

City: Zip Code: State:

Country: Nationality:

(To be filled by Applicant)

ACKNOWLEDGEMENT SLIP

Received from _____ Appl. CA
an application for allotment of units in the following scheme :

	Investment Details	Instrument Details	Amount
Scheme	<input type="text"/>	No. _____ Dated _____	Rs. _____
Plan	<input type="text"/>	Bank & Branch _____	
Option	<input type="text"/>		

Please retain this slip, duly acknowledged by the Official Collection Center till you receive your Account Statement

Official Acceptance Point Stamp & Sign

Please write the Application Number /Folio Number on the face of the Cheque (eg. Kotak 12345/67)

