

SYSTEMATIC WITHDRAWAL PLAN - REGISTRATION FORM

DISTRIBUTOR / BROKER INFORMATION				TIME STAMPING
Name & Broker Code / ARN / RIA	Sub Broker / Sub Agent ARN Code	*EUIIN	Internal Code for Sub-broker/ Employee	
ARN- (ARN stamp here)	ARN-			

*Please sign below in case the EUIIN is left blank/not provided. I/We hereby confirm that the EUIIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker.

#By mentioning RIA code, I/we authorize you to share with the Investment Adviser the details of my/our transactions in the scheme(s) of IDFC Mutual Fund.

Declaration for "execution-only" transaction (only where EUIIN box is left blank) (Refer Instruction No. XIII). – 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.

Signature of First / Sole Applicant /
Guardian / Authorised Signatory

EXISTING UNIT HOLDER INFORMATION (Please mention the PAN/PERN without which, this application form will be considered incomplete and is liable to be rejected.)				
MANDATORY	Name of the First Holder			
	Folio No.	PAN/PERN (mandatory)	Enclosed <input type="checkbox"/> PAN/PERN Proof <input type="checkbox"/> KYC Compliant	

<input type="checkbox"/> SWITCH CUM SYSTEMATIC WITHDRAWAL PLAN	<input type="checkbox"/> SYSTEMATIC WITHDRAWAL PLAN
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SWITCH OPTION (To be filled along with SWP section below)	
I wish to switch ₹	OR Units
FROM Scheme	Plan <input type="checkbox"/> Regular <input type="checkbox"/> Direct
Option <input type="checkbox"/> Growth <input type="checkbox"/> Dividend <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment <input type="checkbox"/> Dividend Frequency	
TO Scheme	Plan <input type="checkbox"/> Regular <input type="checkbox"/> Direct
Option <input type="checkbox"/> Growth <input type="checkbox"/> Dividend <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment <input type="checkbox"/> Dividend Frequency	

SYSTEMATIC WITHDRAWAL PLAN	
Scheme	Plan <input type="checkbox"/> Regular <input type="checkbox"/> Direct
Option <input type="checkbox"/> Growth <input type="checkbox"/> Dividend <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment <input type="checkbox"/> Dividend Frequency	
SWP Period Start	End (If start date is not mentioned default start month will be 13th month.) (If End date is not mentioned SWP will be effected till funds are available)
Option#	Frequency
<input type="checkbox"/> Fixed Amount	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Annual
<input type="checkbox"/> Percentage Withdrawal of Specified Amount	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Annual
Specified Amount (Minimum ₹ 50,000/-)	₹ (in figures) ₹ (in words)
<input type="checkbox"/> Capital Appreciation**	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Annual
	1 st 10 th 20 th Others
	Amount (₹)
	₹ 5% p.a. 7% p.a. 9% p.a. Other (Not less than 5%)
	N. A.

#Please tick only one Option. *Capital Appreciation : Start date for Capital appreciation under SWP is the date from which capital appreciation, if any, will be calculated till the first withdrawal date. \$Refer instructions

YEARLY SWP TOP-UP (OPTIONAL) (Refer instruction no. E*)	
<input type="checkbox"/> Amount <input type="checkbox"/> 500 <input type="checkbox"/> 1000 <input type="checkbox"/> Other in multiples of 500	OR <input type="checkbox"/> Percentage <input type="checkbox"/> 3% (default) <input type="checkbox"/> 4% <input type="checkbox"/> 5% <input type="checkbox"/> Other in multiples of 1%, not decimal

*SWP TOP-UP facility not available for Capital Appreciation Option.

DECLARATION & SIGNATURES	
I/We have read, understood and agree to comply with the terms and conditions of the Statement of Additional Information, Scheme Information Documents and Key Information Memorandum of the Scheme(s), Foreign Account Tax Compliance Act and Common Reporting Standards, statutory requirements prescribed by SEBI, AMFI, Prevention of Money Laundering Act, 2002 (PMLA), Privacy Policy of IDFC Asset Management Company Limited available on the website of IDFC Mutual Fund www.idfcmf.com and all applicable rules and regulations and hereby confirm that I/We have not received nor been induced by any rebate or gifts, directly or indirectly, to make this investment. I/We hereby declare that I/we do not have any existing Micro SIPs which together with the current application will result in a total investments exceeding Rs. 50,000 in a year. 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. For NRIs / PIOs / FPIs only: I/We confirm that I am / we are Non Resident Indians / Person(s) of Indian Origin / Foreign Portfolio Investors but not (i) United States persons as per applicable Regulations or (ii) residents of Canada, and I / we have remitted funds from abroad through approved banking channels or from funds in my / our Non-Resident External / Non-Resident Ordinary / FCNR Account maintained in accordance with applicable RBI guidelines.	
I/We hereby provide my/our consent to IDFC Asset Management Company Limited ("IDFCAMC") for (i) collecting, storing and usage of personal information for the purposes of processing my/our application and providing the services to which I/we have subscribed and for the purposes of meeting legal and regulatory requirements; (ii) receiving updates on promotional material and transaction related communication via mail, telecall, SMS, etc. (iii) validating/authenticating with Unique Identification Authority of India ("UIDAI") by itself or through its Registrar and Transfer Agent ("RTA"); and (iv) downloading and updating my/our Aadhaar number(s) and associated demographic information (including updated information) in my/our accounts/folios under IDFC Mutual Fund, based on my/our Income Tax Permanent Account Number ("PAN") in accordance with the Aadhaar Act, 2016, PMLA and rules & regulations made thereunder and applicable SEBI guidelines. I/We hereby further authorise IDFC AMC for sharing/disclosing of the Aadhaar number(s) and associated demographic information (including any updated information) by itself or through its RTA, depository participants, and asset management companies of other SEBI registered mutual funds, and their RTAs, for the purpose of updating the same in my/our accounts/folios based on my/our PAN.	
First / Sole Applicant / Guardian / Authorised Signatory	Second Applicant
Third Applicant	POA Holder

ACKNOWLEDGMENT - SYSTEMATIC WITHDRAWAL PLAN - REGISTRATION FORM

Name of the First Holder	Folio No.		
SWP Scheme	Plan	Option	
Frequency	Date	Amount (₹) / Percentage	
			STAMP & SIGNATURE