

APPLICATION FORM

TO BE FILLED IN CAPITAL LETTERS

Form No.

1. APPLICANTS' PHOTOGRAPHS

First / Sole Applicant / Guardian

Second Applicant

Third Applicant

Affix your recent passport size photograph and sign across the same

Affix your recent passport size photograph and sign across the same

Affix your recent passport size photograph and sign across the same

Signature

Nominee

Guardian (In case nominee is a Minor)

Affix your recent passport size photograph and sign across the same

Affix your recent passport size photograph and sign across the same

Place

Date

Signature

2. SOLE / FIRST APPLICANT'S DETAILS

Name of First Applicant Mr. / Ms. / M/s.

Existing Client Code, if any

PAN

Residential Status:

Resident

NRI

Nationality: Indian

Others _____

Name of Parent / Guardian (in case of minor) Mr. / Ms. / M/s.

Bank Name

Branch

Bank Address

Bank Tel.

Account Type:

Current

Savings

NRI

Bank Account No.

A/c. Opening Date

MICR Code

IFSC Code (For NEFT / RTGS)

2. SOLE / FIRST APPLICANT'S DETAILS Contd.....

- Nature of Occupation / Business:**
- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Private Sector Service | <input type="checkbox"/> Government Service | <input type="checkbox"/> Business |
| <input type="checkbox"/> Student | <input type="checkbox"/> Professional | <input type="checkbox"/> Farming |
| <input type="checkbox"/> Public Sector Service | <input type="checkbox"/> Retired | <input type="checkbox"/> Forex Dealer |
| <input type="checkbox"/> Housewife | <input type="checkbox"/> Others _____ | |

Brief Details of Occupation / Business _____

- If the following is additionally applicable:**
- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Civil Servant | <input type="checkbox"/> Politician |
| <input type="checkbox"/> Current / Former MP / MLA / MLC / Head of State | |

- Income Details p.a.:**
- | | | |
|--|--|---|
| <input type="checkbox"/> Upto ` 25 Lakhs | <input type="checkbox"/> ` 25 Lakhs to ` 1 Crore | <input type="checkbox"/> ` 1 Crore to ` 5 Crore |
| <input type="checkbox"/> ` 5 Crore & above | | |

Name of Second Applicant Mr. / Ms. / M/s.

Existing Client Code, if any PAN

Residential Status: Resident NRI **Nationality:** Indian Others _____

Name of Parent / Guardian (in case of minor) Mr. / Ms. / M/s.

Bank Name Branch

Bank Address

Bank Tel. **Account Type:** Current Savings NRI _____

Bank Account No. A/c. Opening Date

MICR Code IFSC Code (For NEFT / RTGS)

- Nature of Occupation / Business:**
- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Private Sector Service | <input type="checkbox"/> Government Service | <input type="checkbox"/> Business |
| <input type="checkbox"/> Student | <input type="checkbox"/> Professional | <input type="checkbox"/> Farming |
| <input type="checkbox"/> Public Sector Service | <input type="checkbox"/> Retired | <input type="checkbox"/> Forex Dealer |
| <input type="checkbox"/> Housewife | <input type="checkbox"/> Others _____ | |

Brief Details of Occupation / Business _____

If the following is additionally applicable: Civil Servant Politician
 Current / Former MP / MLA / MLC / Head of State

Income Details p.a.: Upto ` 25 Lakhs ` 25 Lakhs to ` 1 Crore ` 1 Crore to ` 5 Crore
 ` 5 Crore & above

Name of Third Applicant Mr. / Ms. / M/s.

Existing Client Code, if any PAN

Residential Status: Resident NRI Nationality: Indian Others _____

Name of Parent / Guardian (in case of minor) Mr. / Ms. / M/s.

Bank Name Branch

Bank Address

Bank Tel. Account Type: Current Savings NRI _____

Bank Account No. A/c. Opening Date

MICR Code IFSC Code (For NEFT / RTGS)

Nature of Occupation / Business: Private Sector Service Government Service Business
 Student Professional Farming
 Public Sector Service Retired Forex Dealer
 Housewife Others _____

Brief Details of Occupation / Business _____

If the following is additionally applicable: Civil Servant Politician
 Current / Former MP / MLA / MLC / Head of State

Income Details p.a.: Upto ` 25 Lakhs ` 25 Lakhs to ` 1 Crore ` 1 Crore to ` 5 Crore
 ` 5 Crore & above

3. MODE OF HOLDING / OPERATIONS

Single Joint

4. CONTACT DETAILS

Residence Address (Foreign Address in case of NRI)* _____

_____	_____	____ ____ ____ ____ ____ ____ ____ ____	_____
City	State	Pin	Country

Office Address (Foreign Address in case of NRI / FII Applicants) _____

_____	_____	____ ____ ____ ____ ____ ____ ____ ____	_____
City	State	Pin	Country

Preferred Mailing: Address Residence Office

Permanent Address (If Different from above two addresses) _____

_____	_____	____ ____ ____ ____ ____ ____ ____ ____	_____
City	State	Pin	Country

* P.O. Box Number alone is not sufficient.

Tel. No.:	____ ____ ____ ____ ____ ____	____ ____ ____ ____ ____ ____ ____ ____	____ ____ ____ ____ ____ ____ ____ ____	____ ____ ____ ____ ____ ____ ____ ____
	STD Code	Residence	Office	Mobile

____ ____ ____ ____ ____ ____ ____ ____	_____
Fax	Email

5. OTHER DETAILS

Investment Experience: Novice Moderate Well Experienced

Investment Goals: Capital Appreciation Regular Income Both

Risk Tolerance: Conservative Moderate Aggressive

Investment Experience in Securities _____

Approximate Time Period for Investment: _____ Years

6. DEMAT ACCOUNT DETAILS

Depository Participant

Address:

City State Pin

Country DP ID Your ID

7. PORTFOLIO CHOICE

_____ _____ _____

8. FOR NON-INDIVIDUALS ONLY

Legal Status: Partnership Firm FII Society AOP/BOI Banks FI
 Trust Company/Body Corporate HUF Government Organization
 Non-Government Organization Limited Liability Partnership Others _____

Date of Incorporation / Registration

Annual Income / Net Worth (Last 3 Years)

Year 20 _____ Upto ` 25 Lakhs ` 25 Lakhs to ` 1 Crore ` 1 Crore to ` 5 Crore ` 5 Crore & above
Year 20 _____ Upto ` 25 Lakhs ` 25 Lakhs to ` 1 Crore ` 1 Crore to ` 5 Crore ` 5 Crore & above
Year 20 _____ Upto ` 25 Lakhs ` 25 Lakhs to ` 1 Crore ` 1 Crore to ` 5 Crore ` 5 Crore & above

9. NOMINATION

Nominee's Name (Mr. / Mrs. / Master)

Relation

Date of Birth

Guardian Name (In case of Minor Nominee)

Address of Nominee / Guardian

City

State

Pin

Country

10. DECLARATION

The particulars and various other details furnished above are true to best of my / our knowledge and belief. I / We further agree to inform any additional details that may be required for better & efficient execution & performance of my / our Privilege Account. I / We have received the Disclosure Document Provided by the Portfolio Manager at least 2 days prior to entering into Portfolio Management Agreement. I / We have read and understood the terms and conditions of the Disclosure Document as well as the Portfolio Management Services Agreement and undertake to abide with the provisions of the same. I / We do not have access to un- published price sensitive information in any body Corporate. **(Please Note Below)**. I / We hereby declare that the amount invested in the same is through legitimate sources / channel only and does not involve and is not designed for the purpose of any contravention or evasion of any Act, Rules, Regulations. Notifications or Directions of the provisions of Income Tax Act, Prevention of Money laundering Act, Anti Corruption Act or any other applicable laws enacted by the Government of India or any Statutory Authority from time to time.

Additional Declaration applicable to NRIs Only:

I / We hereby confirm that I am / We are Non-Resident of India Nationality / Origin. I / We hereby confirm that the funds for investment have been remitted from abroad through approved banking channels or from funds in my / our Non-Resident External / Ordinary Account / FCNR Account.

Note: Please furnish list of any such body corporate in the relevant section provided subsequently, if your statement is affirmative.

Place:

Date

First / Sole Applicant

Second Applicant

Third Applicant
