



**Birla Sun Life**  
Mutual Fund

The name inspires trust

**COMMON TRANSACTION FORM** (For existing investors)  
(FOR ONE TRANSACTION ONLY)



Broker Code	Sub Broker Code	FOR BMF USE

Form No.

Please strike off the transactions type that are not filled.

**(A) UNIT HOLDERS INFORMATION**

Folio No.	<input type="text"/>								
<b>NAME</b>							<b>Permanant Account Number (PAN)</b> <small>(Supporting documents / Form 60 / Form 61 is must if transaction amount is Rs. 50,000 and above. Refer Instruction No. 7) (Mandatory)</small>		
First Holder	<input type="text"/>								
Second Holder	<input type="text"/>								
Third Holder	<input type="text"/>								
Guardian <small>(In case of Minor)</small>	<input type="text"/>								

**(B) ADDITIONAL PURCHASE (Refer Instruction No. 3, 4 & 5)**

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
Rs. (figures)	<input type="text"/>	Cheque/DD No.		<input type="text"/>	Dated <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Rs. (words)	<input type="text"/>				
Drawn on (Bank)	<input type="text"/>				
Branch	<input type="text"/>	DD charge : Rs.		<input type="text"/>	<input type="text"/>
<small>(Refer Instruction No. 4)</small>					
<i>In case you do not mention the Plan and Option, units will be allotted under default option as per respective scheme(s) offer document(s).</i>					

**(C) REDEMPTION (Refer Instruction No. 9)**

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
Rs. (figures)	<input type="text"/>				
Rs. (words)	<input type="text"/>				
<b>OR</b>					
No. of Units	<input type="text"/>				
<b>Direct Credit to existing bank account (Please refer Instruction No. 9 overleaf) :</b> I/We request you to activate Direct Credit (DCR) facility for my Folio and remit the redemption/dividend proceeds through DCR. (Please ✓ in this Box) <input type="checkbox"/>					

**(D) LATERAL SHIFT/SWITCH (Refer Instruction No. 6)**

Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>
No. of Units	<input type="text"/>	<b>OR</b>		Rs. (figures)	<input type="text"/>
Rs. (words)	<input type="text"/>				
Scheme	<input type="text"/>	Plan	<input type="text"/>	Option	<input type="text"/>

**ACKNOWLEDGEMENT**

	<b>Form No.</b>	
Received for ADDITIONAL PURCHASE / REDEMPTION / LATERAL SHIFT/SWITCH / CHANGE OF BANK DETAILS / DIRECT CREDIT / CHANGE OF ADDRESS / EMAIL CONFIRMATION / ONLINE ACCOUNT ACCESS		
	Folio No.	<input type="text"/>
from Mr./Ms./M/s. <input type="text"/>		
<b>For Only Additional Purchase:</b> Cheque / Draft No. <input type="text"/> for Rs. (Figures) <input type="text"/>		
Rs. (words) <input type="text"/>		
drawn on (bank) <input type="text"/>		Branch <input type="text"/>
		<b>Signature &amp; Stamp</b>

