FORM 1 - FOR LUMP SUM / SIP INVESTMENTS



Application No.

Distributor ARN	Sub-Distributor ARN	Internal Sub-	Broker / Sol ID	Employee Cod	9	EUIN	RIA	CODE^	Serial I	lime Stamp	
ARN 94446	ARN					10037					
	d directly by the investor to the AN	El ragistorad distributor basa	d on the investor's	esseement of various fac				lietributor			
I/We, have invested in the sch	eme(s) of Axis Mutual Fund under o the above mentioned SEBI Regist	Direct Plan. I/We hereby give							t of my/our inv	vestments unde	r Direct Plan of
"I/We hereby confirm tha	t the EUIN box has been intention	allv left blank by me/us as ti	nis								
ansaction is executed with nanager/sales person of the a	out any interaction or advice bove distributor/sub broker or not	by the employee/relationsl withstanding the advice of	in-	le Applicant /	Second	Applicant	Т	hird Applic	ant	Power of At	torney Holder
ppropriateness, if any, provi istributor/subbroker."	ded by the employee/relationship	manager/sales person of t	he	ıardian							
TRANSACTION CHA	RGES FOR APPLICATI	ONS ROUTED THR	DUGH DISTR	IBUTORS/AGENT	S ONLY	(Refer Instru	ction No. 20)				
	rst time investor across Mutu			ıt I am an existing invo							
	npsum) amount is ₹ 10,000/- o vill be deducted from the subso							und invest	tor) or ₹ 100	/- (for investor	r other than fi
	OR'S FOLIO NUMBER			IT TYPE (Please tick			int invoorou.	MOD	E OF HOL	DING	
	ing folio with KYC validated, e and skip to section 6/7.)			UMP SUM WITH SIP			in case of Demat P			-	Demat Account)
		LUMP SUM W	ITH STP 🗌 S	SINGLE CHEQUE MUL	TIPLE SCH	iemes	Single	🗌 Join	1t (Default)	Anyone	e or Survivor
1 APPLICANT INF	ORMATION (MANDAT	ORY) (In case of investment	"On behalf of Minor",	Please Refer Instruction no.	1.))(
FIRST / SOLE APPLICA		- •									
								44.12			
PAN (Mandatory)		Date of Birth	D D M	M Y Y Y	Y CKYC	No.		14 dig	it CKYC Nun	nber	
Aadhaar No.			Mobile No.								
Address											
State			City						Pin Code		
Email ID											
SECOND APPLICANT	Mr. Ms. M/s.										
		Date of Birth	D D M	ΜΥΥΥΥ				1/L did	it CKYC Nun	abar	
PAN (Mandatory)			D D IVI		Y CKYC	INO.		14 uly		IDBI	
Aadhaar No.											
THIRD APPLICANT	Mr. Ms. M/s.										
PAN (Mandatory)		Date of Birth	D D M	M Y Y Y	Y CKYC	No.		14 dig	it CKYC Nun	nber	
Aadhaar No.											
GUARDIAN DETAILS (In	case First / Sole Applicant is	minor) / CONTACT PERS	SON - DESIGNAT	ION / PoA HOLDER (II	n case of N	Von-individu	al Investors)				
Mr. Ms. M/s.											
PAN (Mandatory)		Date of Birth	D D M	M Y Y Y	У СКУС	No.		14 dig	it CKYC Nun	nber	
Aadhaar No.			Mobile No.								
Relationship Of Guardian (F	Pafer Instruction No. 11)		Email ID								
Proof of the Relationshi	p with Minor 🗌 Birth Cer	tificate 🗌 School Certi	ficate 🗌 Passp	ort 🗌 Other				Specify			
	e for First / Sole Applicant)						0		-		
Resident Individual	Partnership Firm QFI	HUF Club / Socie	ety 🗌 PIO	Body Corporate		nor 💷	Government Bo	oay 🗆	Irust	NRI - NRE	Bauk &
						ohe					
6 DEBIT MANDATE	(For Axis Bank A/c only.) To be proce	ssed in CMS software under clier	nt code "AXISMF"	TO BE DETACHED BY KAP	VY & PRESENT	TED TO AXIS BAN	ксмs Applie	cation No			
/ We	Name	of the account holder(s)			autho	orise you to	debit my/our a	ccount no.	Date	D D M	MY
			Account typ	e 🗌 Savings 🗌 NRO	NRE [Current	FCNR Ot	hers	Specify	to pay for	the purchase
Axis Income Saver	Axis Midcap Fund 🗌 Axis Triple	Advantage Fund Axis	Equity Fund 🗌 🖌	xis Focused 25 Fund	Axis Lon	g Term Equit	y Fund 🗌 Axis	Enhanced	Arbitrage Fu	nd 🗌 Axis Eq	uity Saver Fund
Axis MF Multiple Scheme	s Amount (f	igures)				()	vords)				
Signatu	re of First Account Holder		Signature o	f Second Account Holde				Signature	e of Third Acc	ount Holder	
-											
	ENT SLIP Received subject to re	alisation, verification and cond	litions, an applicatio	n tor purchase of Units as	mentioned in	the applicatio	n torm. Applic	ation No			
From											
Cheque no.	Date	Amount		Sch	eme						

2 KYC DETAILS (Refer Ins	truction No. 8. In case of investment "On behalf of Minor", Please Refer Instruction No. 11)
OCCUPATION [Please tick (\checkmark)]	
FIRST APPLICANT	Private Sector Service Public Sector Service Government Service Business Professional Agriculturist Housewife Student Forex Dealer Others
SECOND APPLICANT	Private Sector Service Public Sector Service Government Service Business Professional Agriculturist Housewife Student Forex Dealer Others

GROSS ANNUAL INCOME [Please tick (\checkmark)]

THIRD APPLICANT

FIRST APPLICANT	🗌 Below 1 Lac 🗌	1.5 Lacs 🗌 5.10 Lacs 🗌 10.25 Lacs 🗌 > 25 Lacs · 1 Crore 🗌 > 1 Crore												
	Net worth (Mandatory	for Non - Individuals Rs.	ot older than 1 year]											
SECOND APPLICANT	🗌 Below 1 Lac 🗌	1.5 Lacs 5.10 Lacs 10.25 Lacs > 25 Lacs · 1 Crore > 1 Crore OR Net Worth												
THIRD APPLICANT	🗌 Below 1 Lac 🗌	1.5 Lacs 5.10 Lacs 10.25 Lacs > 25 Lacs · 1 Crore > 1 Crore OR Net Worth												
For Individuals		For Non-Individual Investors (Companies, Trust, Partnership etc.)												
		For Non-Individual Investors (Companies, Trust, Partnersnip etc.)												
I am Politically Exposed Perso	on	Is the company a Listed Company or Subsidiary of Listed Company or Controlled by a Listed Company: (If No, please attach mandatory UBO Declaration)	Yes No											
		Is the company a Listed Company or Subsidiary of Listed Company or Controlled by a Listed Company:	Yes No											
I am Politically Exposed Perso		Is the company a Listed Company or Subsidiary of Listed Company or Controlled by a Listed Company: (If No, please attach mandatory UBO Declaration)												

Private Sector Service Public Sector Service Government Service Business Professional Agriculturist Housewife

3 FATCA AND CRS DETAILS FOR INDIVIDUALS (Including Sole Proprietor. Refer Instruction No. 23)

Student Forex Dealer Others

The below information is required for all applicants/guardian

	Place/City of Birth	Country of Birth	Country of Citizenship / Nationality
First Applicant / Guardian			□ Indian □ U.S. □ Others
Second applicant			□ Indian □ U.S. □ Others
Third applicant			□ Indian □ U.S. □ Others

Are you a tax resident (i.e., are you assessed for Tax) in any other country outside India? Yes No [Please tick] If 'YES' please fill for ALL countries (other than India) in which you are a Resident for tax purpose i.e. where you are a Citizen/Resident / Green Card Holder / Tax Resident in the respective countries.

	Country of Tax Residency	Tax Identification Number or Functional Equivalent	ldentification Type (TIN or other please specify)	Address Type
First Applicant / Guardian				□ Residential □ Registered Office □ Business
Second applicant				☐ Residential ☐ Registered Office ☐ Business
Third applicant				🗌 Residential 🗌 Registered Office 🗌 Business

Annexure I and Annexure II are available on the website of AMC i.e. www.axismf.com or at the Investor Service Centres (ISCs) of Axis Mutual Fund

4 DEMAT ACCOUNT DETA	AILS (OPTIONAL)	(Please ensure that the sequence of name	es as mention	ed in t	he appli	ation f	orm ma	atches v	with th	at of the A	/c. held with the depository p	articipa	nt.) Re	efer Ins	truction	No. 19)	
NSDL: Depository Participant Name		[DPID No.	Ι	Ν						Beneficiary A/c No.							

CDSL: Depository Participant Name			Beneficiary A/c No.]
Enclosed	Client Master	Transaction/ Statement Copy/ DIS Copy					

QUICK CHECKLIST

KYC acknowledgement letter (Compulsory for MICRO Investments)	SIP Registration Mandate - NACH for SIP investments
Self attested PAN card copy	Multiple Bank Accounts Registration form (if you want to register multiple bank accounts so that future payments can be made from any of the accounts)
Email id and mobile number provided for online transaction facility	Relationship proof between Guardian and Minor (if application is in the name of a Minor) attached
	Additional documents attached for Third Party payments. Refer instruction No. 7.
Plan / Option / Sub Option name mentioned in addition to scheme name	FATCA Declaration.



5	NOMINAT	ION D	ETAIL	S (Mand	ntory) (Re	fer Instr	ruction	No. 18	3)																																
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S	P period Sta	rt Date	M	M Y	Y	End D	ate	M	M	γ	Y)R		Enc	d d	late (re	ef 13(i))	1	2	9	9	lf	end (date i cons	is no ider	⊥ t me ed fo	ntior r ner	1ed	then	the	SIP		40 7		1 0 1 0	.,	011111		
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