

# Request for Consolidation of Folios

Please complete all sections in English. For legibility, please use BLOCK LETTERS in black or dark ink

L&T Mutual Fund

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ARN-4464 E032737  
VIKRAM S. BAGADTHEY

Sub: Consolidation of Folios

## PERSONAL DETAILS

Name of Sole/1st Unit Holder  First Name  Middle Name  Last Name  Folio No.

PAN/PEKRN\*\*  First Unit Holder  Second Unit Holder  Third Unit Holder

KIN\*  First Unit Holder  Second Unit Holder  Third Unit Holder

Date of Birth\* (1st Unit Holder)  Date of Birth\* (2nd Unit Holder)  Date of Birth\* (3rd Unit Holder)

Mobile No. +91-  E-mail ID

**KYC is mandatory. Please enclose copies of KYC acknowledgement letters for all applicants. \*\*PEKRN required for Micro investments upto Rs. 50,000 in a year.**  
^ 14 digit KYC Identification Number (KIN) and Date of Birth is mandatory for Individual(s) who has registered under Central KYC Records Registry (CKYCR).

Dear Sir/Madam,

I/We wish to consolidate my/our following investments into folio no. \_\_\_\_\_ (target folio)

SR. No.	Folios to be Merged	Name of 1 <sup>st</sup> Unit Holder	Name of 2 <sup>nd</sup> Unit Holder	Name of 3 <sup>rd</sup> Unit Holder

I/We understand that consolidation of folios is permitted only if;

- All unit holders in the source folios are also unit holders in the target folio in the same sequence
- The mode of operation across source folio & target folio are the same
- The bank mandate and postal address across source folio & the target folios are the same
- The nomination details across source folio & target folio are the same
- No lien/pledge is marked in respect of any investment in any of the source/target folio

I/We understand that as a result of consolidation, my/our contact details in target folio would be retained while these details featuring in all other source folios would be discarded.

Yours Sincerely,

X Name of the First Unit Holder

X Name of the Second Unit Holder

X Name of the Third Unit Holder

X Signature of First Unit Holder

X Signature of Second Unit Holder

X Signature of Third Unit Holder

(To be signed by all holders if the mode of operation is "Joint")

## ACKNOWLEDGEMENT SLIP (To be filled in by the Applicant)

Received from \_\_\_\_\_ Folio no/ Application no: \_\_\_\_\_

Mobile No: \_\_\_\_\_ PAN: \_\_\_\_\_

Request submitted \_\_\_\_\_

Subject to further verification and furnishing of mandatory information/ documents. Please retain this slip until processed

For Office Use Only  
Acknowledgement  
Stamp & Date