

# Folio Consolidation Request

## ARN-4464 E032737 VIKRAM S. BAGADTHEY

I/We am/are holding below mentioned investment folios in Kotak Mahindra Mutual Fund

Folio no.	Sole/ First Unit-holder	Second Unit-holder	Third Unit-holder

Kindly consolidate all my/ our afore-mentioned folios into a single target folio, ie: Folio No. \_\_\_\_\_\_\_

### **UNIT HOLDER(S) SIGNATURE(S) & DECLARATION**

I/We agree that the mode of holding, bank mandate, address and nomination details in the Target Folio will be applicable and will prevail after consolidation.

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GNATURE(S)	Signature of Sole/ First Unit-holder	Signature of Second Unit-holder	Signature of Third Unit-holder		
S	(To be signed by All Unit-holders irrespective of Mode of Holding)				
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## KINDLY SUBMIT THIS FORM TO YOUR NEAREST KMAMC/ CAMS OFFICE

#### **Important Note**

- 1. If target folio is not specified, latest folio will be considered as Target Folio
- 2. Consolidation of Folios will be effected only if the following information is identical in all Folios
  - Names of All unit holders
  - PAN of All unit holders
  - Address
  - Order of the holdings
  - Mode of Holding
  - Tax Status
  - Nominee Name
  - Bank details
- 3. Folios under Lien / Pledge shall be ignored in Consolidation Request, unless the same has been submitted along-with the Financiers Consent