## Application Form for PE STP (FORM 1) (For New Investors)



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Society   Society / AOP/ BOI   Other   Please specify investor: Please attach the mandatory Form for Additional KYC, FATCA & CRS Annexure for Individual Accoudual investor: Please attach the mandatory Details of Ultimate Beneficial Owner including additional FATCA:  Details   PAN/PERN   KYC   KYC   Compliant   KIN   KY   Identify  atils   PAN/PERN   KYC   KYC   KYC   KYC   KYC   KYC   KYC   KYC   Compliant   KIN   KY   Identify  Deprietor   PAN/PERN   RYC   KYC   KYC   KYC   KYC   Compliant   KIN   KY   Identify  TAILS Individuals (single or joint applicants) are advised to avail Nomination facility.  TAILS Individuals (single or joint applicants) are advised to avail Nomination facility.  TAILS Individuals (single or joint applicants) are advised to avail Nomination facility.  TAILS Individuals (single or joint applicants) are advised to avail Nomination facility.  TAILS Individuals (single or joint applicants) are advised to avail Nomination facility.  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## ARN-4464 E032737 VIKRAM S. BAGADTHEY 4. INVESTMENT & PAYMENT DETAILS (Please refer to the Instruction No. E, J, N, L) Payment Type (please ✓): Self Third Party Payment (please fill the 'Third Party Payment Declaration Form')

	ayment Type (please *): Sell Hill Falty Fayment (please ill the filled Party Payment Declaration Form)
	Source Scheme IDFC MMF-TP Ultra-Short Term Fund Cash Fund Arbitrage Fund Arbitrage Plus Fund Plan
SECTION	Option Growth Div-Reinvest Div-Payout Div-Sweep* Div Frequency
	*Dividend Sweep Option to (Scheme & Plan Name) IDFC
S	Dividend Sweep Option is available from all Debt Schemes to Equity and Equity to Debt Schemes of IDFC Mutual Fund. Please fill in all details of Sweep.
	LUMPSUM PAYMENT DETAILS
=	Lumpsum Amount Rs. Amount in figures Amount in words
ECTION	Payment Mode Cheque DD RTGS/NEFT Funds Transfer Instrument No. Date DDMMYY
Ĕ	CAMS OTM CAMS OTM NO. Account No.
EC	Amount (₹) (i) Bank Name
S	DD charges, (₹)(ii)  Branch & City
	Total Amount (₹) (i) + (ii) in figs Account Type Current Savings NRO NRE FCNR
	STP DETAILS (Refer Instruction x)
	STP Installment amt (Rs.) (*) Plan (please ✓) My Plan investors - please specify the installment multiple for Yellow & Green Zones
	Default Red Zone 1 * Yellow Zone 2 * Green Zone 5 *  My Plan Red Zone 1 * Yellow Zone * Green Zone *
	Minimum STP installment amount in target scheme is Rs. 2,000/- for IDFC Premier Equity Fund / Rs. 500/- and in multiples of Rs. 500/- for Tax Advantage (ELSS) Fund / Rs. 100/- for Nifty Fund / Rs. 1,000/- for all other eligible schemes and any amount thereafter for all schemes except ELSS.
≡	Premier Equity Fund Sterling Equity Fund Focused Equity Fund
ECTION	Target Scheme IDFC Equity Fund Infrastructure Fund Dynamic Equity Fund Nifty Fund Tax Advantage (ELSS)
Ë	Option Growth Div-Reinvest Div-Payout Div-Sweep* Div Frequency
SEC	*Dividend Sweep Option to (Scheme & Plan Name) IDFC Growth Div-Payout Div-Reinvest
0,	Dividend Sweep Option is available from all Debt Schemes to Equity and Equity to Debt Schemes of IDFC Mutual Fund. Please fill in all details of Sweep.  STP Frequency (Default STP Frequency is Monthly) (Refer instruction M)  STP Enrollment Period (Default End Date is Dec., 2099
	STP Frequency (Default STP Frequency is Monthly) (Refer instruction M)  STP Enrollment Period (Default End Date is Dec., 2099  Weekly - Daywise  Weekly - Datewise
	(Every Monday) (Date will be 7th/14th/21th/28th of the month) From M M Y Y Y Y Y To M M Y Y Y Y Y
	Fortnightly (Date will be 1t/16th of the month)  [Default STP date is 5th) (Any date except 29th, 30th and 31th of the month)
5. B	ANK DETAILS (Mandatory) Redemption / Dividend / Refund payouts will be credited into this bank account in case it is in the current list of banks
	whom IDFC MF has DC facility (Please refer to the Instruction No. I)
Nar	ne of the Bank Branch Branch
	count Number City
Acc	count Type Current Savings NRO NRE FCNR Others (please specify)
	R Code RTGS/NEFT Code
	e: In case the registered bank mandate is different from that used to source the investment, please enclosed the a cheque copy.  understand that the instructions to the bank for Direct Credit / NEFT will be given by the Mutual Fund, and such instructions will be adequate discharge of the Mutual Fund toward
reder	nption / dividend / refund proceeds. In case the bank does not credit my /our bank account with / without assigning any reason thereof, or if the transaction is delayed or not effected credited into the wrong account for reasons of incomplete or incorrect information, I / We would not hold IDFC Mutual Fund responsible. Further the Mutual Fund reserves the right:
	a demand draft / payable at par cheque in case it is not possible to make payment by DC/NEFT.
	however the unit holders wish to receive a cheque (instead of a direct credit into their bank account) please tick the box alongside
	/e have read and understood the terms and features of the scheme(s) and associated risk factors. Having read and understood the contents of the Statement of Additional Information (SAI) of IDF al Fund, Scheme Information Document (SID) and Key Information Memorandum (KIM) of the scheme(s) and the Addenda issued till date, I/we hereby apply for the units of the Scheme(s) and agree
abide	by the terms, conditions, rules and regulations governing the Scheme(s). I/ We hereby declare that the amount invested in the Scheme(s) is through legitimate sources only and does not involve and esigned for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions of the Taxation Laws, Anti Money Laundering Laws, Anti Corruption Laws or any other
	cable laws as applicable to me/us from time to time. I / We confirm that the funds invested in the Scheme(s), legally belong to me / us and I / we have not received nor have been induced bebate or gifts, directly or indirectly in making this investment. I/We am/are eligible Investor(s) as per the scheme related documents and am/are authorised to make this investment as per the
regu	titutive documents/ authorisation(s). I/We further confirm that I am not /we are not prohibited from accessing capital markets under any order/ruling/judgment etc., of any judicial atory authority. 2. In the event " Know Your Customer" process is not completed by me / us to the satisfaction of the Mutual Fund, I / we hereby authorise the Mutual Fund, to redeem the fund
may	ted in the Scheme(s), in favour of the applicant, at the applicable NAV prevailing on the date of such redemption subject to applicable exit load and undertake such other action with such funds the be required by the Law 3. I/We hereby acknowledge and confirm that the information provided above is/are true, correct and complete to the best of my/our knowledge and belief. In case any of the
chan	e specified information is found to be false or untrue or misleading or misrepresenting, I/we shall be liable for it. I/We also undertake to keep you informed immediately in writing about ar ges/modification to the above information in future and also undertake to provide any other additional information as may be required at your end. I/We hereby authorise you to disclose, share, remit
Mana	orm, mode or manner, all/any of the information provided by me/us, including all changes, updates to such information as and when provided by me/us to the Mutual Fund, its Sponsor, Assa igement Company, Trustees, their employees, agents / service providers, other SEBI registered intermediaries or any Indian or foreign governmental or statutory or judicial authorities cies, the tax / revenue authorities and other investigation agencies without any obligation of advising me/us of the same. 4. The ARN holder has disclosed to me/us all the commissions (in the same and the same and the remainder of the same and th
form	cies, the tax/revenue authornes and other investigation agencies without any obligation of advising me/us of the same, 4. The ARN holder has disclosed to me/us at the commissions (in troof trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. 5. Figure 1. We confirm that I/we do not have any other existing investment in the schemes of IDFC Mutual Fund which together with this proposed investment will result in aggregate.
inves	range grant to the committed by we do not have any other existing investment in the schemes of the Chitaga rule which together with this proposed investment with result in aggregation that the committee of the
resid	spersors within the healing of negliation (3) date the blined states securities act of 1935, or as defined by the 0.5. Commonly rutures fracing commission, as a merided from the to time tentral fractions are not set to 1935, or as defined by the 0.5. Commonly rutures fraction (3) and ruture to time tentral fractions are the common fractions and the 1 / we have remitted funds from abroad through approved banking channels or from funds in my / our Non-Resident External / Non-Resident Ordinary / FCNR Account the common fractions are the common fractions and the common fractions are the common
□ 1/	We hereby confirm that, I/We have read and understood the Privacy Policy hosted on www.idfcmf.com. I/ We hereby consent IDFC AMC/IDFC MF/Trustee to share information
	uding sensitive personal data or information) provided in relation to our Investment in IDFC MF to any Associate / Group company / Affiliate of IDFC AMC/IDFC MF / Trustee, foing, marketing or solicitation of their products and services.
Firs	t/ Sole Applicant/ Guardian/ Second Applicant Third Applicant POA Holder
	Authorised Signatory Place
·	

For Financial Transactions Toll free 1-800-2-666688 Available between 8.00 am to 7.00 pm on business days only. For Non Financial Queries/Requests Toll free 1-800-300-66688 Available between 8.00 am to 7.00 pm on business days only.

Please note our investor service email id investormf@idfc.com

www.idfcmf.com