## **Mutual Funds**

SIP/CSIP STEP-UP Amount: ₹

Aditya Birla Sun Life Mutual Fund



PROTECTING INVESTING FINANCING ADVISING

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## A. TERMS & CONDITIONS FOR STEP-UP FACILITY IN EXISTING SYSTEMATIC INVESTMENT PLAN (SIP/CSIP)

- This facility will allow investor to opt for STEP-UP in their existing SIP/CSIP, which are routed through Direct Debit/ECS/SI and NACH mode.
- 2) Separate form has to be used for each SIP/CSIP.
  - SIP STEP-UP in NACH/DD/ECS/SI option can be given to the extent of the maximum amount of existing mandate amount linked to the respective SIP/CSIP.
  - Else the investor will be required to give the new mandate request with enchance amount with the STEP-UP request.
- 3) Incase, an investor has more than one existing SIP/CSIP in a single folio in the same scheme with a single distributor, unless specifically instructed by the investor, the STEP-up request shall be considered for the first registered SIP/CSIP.
- 4) Investors/unit holders subscribing for this facility are required to submit the request at least 30 days prior to the SIP/CSIP date. STEP-UP will be applicable from next effective SIP/CSIP installment.
- 5) SIP/CSIP STEP UP will be allowed in Micro SIP/CSIP folio subject to condition that total investment including SIP STEP UP does not exceed ₹ 50,000/- in a rolling 12 month period or financial year i.e. April to March, the limit on Micro SIP/CSIP investments.
  - For minor folio, Stepup will be registered till minor attains majority.
- Incase of rejection of new mandate by investor's banker, SIP would be terminated.
- 7) The investor agrees to avail the STEP UP facility for SIP/CSIP and authorize his/her bank to execute the NACH for a further increase in installment from his/her designated account.
- 8) STEP-UP SIP/CSIP
  - a. Frequency for Step-Up SIP/CSIP:
    - Half Yearly Step-Up SIP/CSIP: Under this option, the amount of investment through SIP installment shall be increased by amount chosen/designated by Investor post every 6th (sixth) SIP/CSIP installment.

- Yearly Step-Up SIP/CSIP: Under this option, the amount of investment through SIP/CSIP installment shall be increased by amount chosen/designated by Investor post every 12th (twelfth) SIP/CSIP installment.
- b. Minimum Step-Up SIP/CSIP Amount: ₹ 500 and in multiples of ₹ 500 thereafter.
- c. Default Step-Up SIP/CSIP Frequency and amount: In case the investor fails to specify any frequency or amount for Step-Up SIP/CSIP, the same shall be deemed as Yearly Step-Up SIP/CSIP and ₹ 500 respectively and the application form shall be processed accordingly. In case the investor fails to specify both, i.e. the frequency for Step-Up SIP/CSIP and amount for Step-Up SIP/CSIP, the application form may be processed as conventional SIP/CSIP, subject to it being complete in all other aspects.
- d. SIP/CSIP application form has "Max Cap Amount", Step up will be registered till each SIP amount reaches max cap amount. Further max cap amount would remain constant for continuing future instalments till its SIP/CSIP End date.
  - OTM max amount and Cap amt should be same, if it is different then which ever is less would be considered as Cap amount.
  - If investor fails to mention the "Max Cap Amount" then step up would continue as per the frequency/step up amt mentioned on the application form considering the OTM max amount.
  - For Century Step up Insurance coverage amount would be calculated basis the 1st installment amount.
- 9) Conversion of Step-Up to SIP/CSIP
  - Where STEP-UP SIP/CSIP will be converted to normal SIP/CSIP, each SIP/CSIP amount will be the last STEP-UP amount triggered in the STEP-UP registration and continue as normal SIP/CSIP.
  - Investor / Unit holder subscribing for this facility are required to submit the request at least 30 days prior to the SIP/CSIP date.
- 10) Incase the existing registration details mentioned in the form is incorrect the request would be rejected.