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Common Application Form For Tata Mutual Fund

ALL THE DETAILS REQUESTED IN THE FORM ARE MANDATORY FOR EACH OF THE APPLICANTS

Sr. No.:

1. Advisor / Distributor Information

Refer Sec. B

Details of the advisor empanelled with Tata Mutual Fund who has guided you for this investment.

Form section for Advisor/Distributor Information including fields for Broker/ARN Code (24863), Sub-Broker ARN Code, Sub-Broker/Bank Branch Code, EUIN Code (E043887), and signature/thumb impression areas for 1st, 2nd, and 3rd applicants.

2. Applicant's Information

Refer Sec. A, C & I

The Name of the Applicants should be as mentioned in the PAN and the KYC acknowledgement. There can be upto 3 holders. No joint holders allowed with 1st applicant as a minor.

1st Applicant's Details

The first applicant will be the primary holder and all correspondence will be sent to him/her. Only the first holder can be a minor.

Form section for 1st Applicant's Details including fields for Name, Date of Birth (DOB), and Proof of DOB (Birth certificate, School leaving certificate, Passport, Others).

Power Of Attorney (POA) / Proprietor Details / Guardian details in case of minor applicant

POA / Proprietor / Guardian Details
To be filled by Guardian

Form section for Power Of Attorney / Proprietor / Guardian details including fields for Name, Relationship with the Minor Applicant, and Proof of Relationship.

Tax Status

Form section for Tax Status with multiple checkboxes for Resident Individual, NRI-Repatriation, NRI-Non-Repatriation, Minor - Resident Individual, Minor - NRI, Person of Indian Origin, Sole Proprietorship, Hindu Undivided Family, Partnership, Company, Trust, Others, Body Corporate, Limited Liability Partnership, Body of Individuals, Society / Club, Non Profit Organization, Overseas Citizen of India, Foreign National Resident in India, Qualified Foreign Investor, Foreign Portfolio Investor, Foreign Institutional Investor.

3. Contact Details

Refer Sec. D

Mailing address

This is required for initial communication, we will overwrite this address with the 1st Applicants address as per the KRA records

Form section for Mailing address including fields for City, PIN, State, Country, Residence Phone, Office Phone, Extn, Mobile, and Email.



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Acknowledgement Slip

Sr. No.:

Received from Mr./Ms./M/s. PAN ₹ for purchase in Cheque Details Overleaf / Subject to realisation.