



Think Investments. Think Kotak®

COMMON APPLICATION FORM

6th Floor, Kotak Infinity, Building No. 21, Infinity Park, Off. Western Express Highway, Gen. A. K. Vaidya Marg, Malad (E), Mumbai - 400 097.
☎ 022-6638 4400
✉ mutual@kotak.com
★ www.kotakmutual.com



Investment Advisor's Name & ARN

Sub-Broker's Name & ARN
Sub-Broker \ LG Code

Official Acceptance Point

Bank Sr. No.

Appl. CA **3430027**

Prudent CAS Ltd
9992

BHAVESH MODH
27030

Date : / /

Upfront commission shall be paid directly by the investor to the AMFI registered distributors based on the investor's assessment of various factors including the service rendered by the distributor.

1. EXISTING UNITHOLDER INFORMATION [Refer Guideline 2(a)]

If you have, at any time, invested in any Scheme of Kotak Mahindra Mutual Fund and wish to hold your present investment in the same Account, please furnish your Name, Account Number and PAN details below and proceed to Section 4.

Name of Sole / First Holder: _____ Account No.: _____ / _____

2. NEW APPLICANT'S PERSONAL INFORMATION [Refer Guideline 2]

SOLE/FIRST APPLICANT

Name

Date of Birth
/ /

GUARDIAN (in case Sole / First Applicant is a minor)

Name

CONTACT PERSON (in case of Non-individual applicants)

Name

Designation

SECOND APPLICANT (Joint Holder 1)

Name

THIRD APPLICANT (Joint Holder 2)

Name

MODE OF OPERATION (where there is more than one applicant)

First Holder only Anyone or Survivor Joint

PAN AND KYC COMPLIANCE STATUS DETAILS (Mandatory)

KYC Compliance Status*
 PAN Proof # Yes No

KYC Compliance Status*
 PAN Proof # Yes No

KYC Compliance Status*
 PAN Proof # Yes No

(#Please attach PAN Card Copy) / (*KYC allotment letter copy is mandatory for investment => Rs. 50,000/-)

- Status (Please ✓)
- Resident Individual
 - NRI on Repatriation Basis
 - NRI on Non-Repatriation Basis
 - HUF
 - Proprietorship
 - Partnership Firm
 - Private Limited Company
 - Public Limited Company
 - Mutual Fund
 - Mutual Fund FOF Scheme
 - Body Corporate
 - Registered Society
 - PF/Gratuity/Pension/ Superannuation Fund
 - Trust AOP / BOI
 - Foreign Institutional Investor
 - On behalf of Minor
 - Other _____ (Please specify)
- Occupation (Please ✓) (Mandatory)
- Business
 - Service
 - Professional
 - Retired
 - Housewife
 - Student
 - Agricultur
 - Other _____ (Please specify)

ADDRESS FOR COMMUNICATION (Mandatory)

City Pin Code State (Cell)
E-mail Tel (Fax)

OVERSEAS ADDRESS (Mandatory for Non-Resident applicants)

Address for Correspondence (Please ✓) Indian Overseas

City Zip Code State Nationality
Country



(To be filled by Applicant)

Received from _____
an application for allotment of units in the following scheme :

ACKNOWLEDGEMENT SLIP

Appl. CA **3430027**

	Investment Details	Instrument Details	Amount
Scheme		No. _____ Dated / /	Rs. _____
Plan		Bank & Branch _____	
Option			

Official Acceptance Point Stamp & Sign



Please retain this slip, duly acknowledged by the Official Collection Center till you receive your Account Statement

