



# STEP BY STEP

## FINANCIAL ADVISORY

The most arduous of journeys begin with a small step

### COMMON TRANSACTION SLIP

(For Existing Unit Holders)

AMC \_\_\_\_\_

Folio No: \_\_\_\_\_

FINANCIAL TRANSACTION:

Broker Code: **STEP BY STEP  
FINANCIAL ADVISORY**

ARN-81654      EUIN: E028102

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

#### A. ADDITIONAL PURCHASE

Scheme:	Plan:	Option:
Amount:Rs.	Cheque No.:	Dated:
Drawn on:		Branch:

#### B. REDEMPTION

I wish to Redeem:Rs.	Or Units:
From Scheme:	Option:

#### C. SWITCH

I wish to Switch: Rs.	Or Units:
Scheme(From):	Option:
Scheme(To):	Option:

Signature:

Sole/First Holder		Second Holder		Third Holder	
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### NON-FINANCIAL TRANSACTION:

Folio No: \_\_\_\_\_

#### D. CHANGE OF BANK MANDATE-

Name of Bank:		A/c Number:	
Branch Address:		A/c Type:	
City:	Pin Code:	*MICR:	**IFSC Code:
Cancelled cheque leaf is attached.			

\* MICR stands for Magnetic ink character recognition. It consists of Nine Digit and is next to six digit Cheque number. The strip is basically bottom strip of cheque where information about chq no, city code, bank code and branch code is given. This MICR code is used in RBI clearing process to identify the branch and bank for clearing processes.

\*\* IFSC stands for Indian Financial System Code. The code consists of 11 Characters - First 4 characters represent the entity; Fifth position has been defaulted with a '0' (Zero) for future use; and the Last 6 character denotes the branch identity.

#### E. CHANGE OF ADDRESS

Address:			
City:	State:	Pin Code:	Country:

#### F. EMAIL ID UPDATION

Please update my email id in your records and request you to email all communications and statements on this email id in future:

#### G. PAN AND KYC UPDATION

Please update my Pan Number \_\_\_\_\_ in your records. Copy of the pan card is attached.

Please update my KYC in your records. Copy of the KYC acknowledgement letter is attached.

Declaration: 1. Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. 2. The ARN holder has disclosed to me/us all the commission (in the form of 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.

### Signature:

Sole/First Holder		Second Holder		Third Holder	
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