

SIP MODIFICATION FORM

Distributor Code	Sub-Distributor	Sub-Distributor Code	EUIN
ARN	ARN		

1 Investor Details (Please provide the following details in full)

Name

My folio number(s)

PAN First/Sole Unitholder/Guardian Second Unitholder Third Unitholder

2 Existing SIP Details

Scheme Name /Plan/Option **Axis**

Each SIP Amount (₹) Amount in words (₹)

SIP Frequency (✓) ☐ Monthly ☐ Yearly SIP Date

SIP Start Month/Year SIP End Month/Year

3 New SIP Details

Scheme Name /Plan/Option **Axis**

Each SIP Amount (₹) Amount in words (₹)

SIP Frequency (✓) ☐ Monthly ☐ Yearly SIP Date

SIP Start Month/Year SIP End Month/Year

4 DECLARATION & SIGNATURES (To be signed as per the Existing Mode of Holding)

Investor Details	1st holder	2nd Holder	3rd Holder
Name			
Signature			

Date Place

INSTRUCTIONS

- In order to provide flexibility, an investor investing through SIP shall have an option to modify the selected scheme and / or SIP installment amount and / or SIP end date, in the scheme wherein the SIP investments are currently being made.
- The SIP modification facility can be availed by an investor for 2 times in SIP life cycle
- Request has to be submitted atleast 21 days prior to the next SIP installment date (excluding the request date and the next SIP installment date).
- Please use separate modification forms for different schemes in the same folio or different folios
- SIP modification is not applicable if Flex SIP is registered in folio
- SIP Modification Request shall be taken as Cease of Existing SIP & Registration of a fresh SIP. Hence, the load structure prevailing at the time of registration of SIP Modify request, will be applicable.
- The broker code mentioned on the initial SIP registration request will continue even after the SIP Modification registration request is given. In case a different broker code is specified on the SIP Modification registration request then the same will not be considered.
- In case your existing SIP has been registered through the OTM Mandate, then you need not fill the OTM form again, unless you intend to increase the amount registered as per existing OTM. Else, you will have to mandatorily fill the OTM form, to effect any change in your existing SIP.
- SIP Modification will not be available for Exchange registered SIP, SIP through Channel Partner, Online SIP, standing instruction mode.
- If there is modification in SIP amount then, unit holder needs to verify limit/frequency set in existing NACH mandate. As the SIP installment after modification exceeds the maximum amount for debit, then the request to modify SIP instalment amount will be rejected
- If the investor submits request for Modify SIP details for a SIP registration where the SIP top-up facility then, the same shall be cancelled immediately upon receipt of Modify SIP details request.
- Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. In case no date is selected SIP will be process by default date.
- Alterations in the form, if any should be countersigned as per the mode of holding registered in the folio(s).
- It is Mandatory to write SIP amount in both figures and in words.
- The following applications will be considered as liable to be rejected:
 - If the SIP period mentioned in SIP via NACH/OTM form is beyond the NACH/OTM validity period or NACH/OTM validity period expired.
 - If modify SIP details do not meet the amount / tenure conditions as per the Scheme Information Document of the respective scheme or the registered mandate.
 - The facility to modify the amount will be available only to those investors who have registered maximum amount for debit. However, once the investor has availed modification facility then the maximum amount for debit mandate cannot be reduced.

Folio number Date

Received from Mr./Ms./Mrs.

Stamp & Signature