The Wealth Company
MUTUAL FUND

SIP MODIFICATION APPLICATION FORM

Toll Free Number : 1800 267 3454 | Email : investorcare@wealthcompany.in | Website : www.wealthcompanyamc.in

1. MFD /RIA INFORMATION

Name & ARN Code	Sub Agent ARN Code	Sub Agent Code /Bank Branch Code/ Internal Code	*EUIN	RIA Code
ARN -	ARN			

*Please sign below in case the EUIN is left blank/not provided. I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker. I/We, have invested in the Scheme(s) of your Mutual Fund under Direct Plan. I/We hereby give you my/our consent to share/provide the transactions data feed/ portfolio holdings/ NAV etc. in respect of my/our investments under Direct Plan of all Schemes Managed by you, to the above mentioned Mutual Fund Distributor / SEBI-Registered Investment Adviser:

Sign Here	First / Sole Applicant / Guardian / Authorised Signatory	Second Applicant / Authorised Signatory	Third Applicant / Authorised Signatory

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. APPLICANT DETAILS

FOLIO NO.

Name of Sole/1st holder _____ PAN No / PEKRN. _____ (Mandatory) ☐ KYC

Name of 2nd holder _____ PAN No / PEKRN. _____ (Mandatory) ☐ KYC

Name of 3rd holder _____ PAN No / PEKRN. _____ (Mandatory) ☐ KYC

3. EXISTING SIP DETAILS

Scheme Name /Plan/Option _____ Plan (✓) ☐ Direct ☐ Regular

SIP Amount(₹) _____ Amount in words (₹) _____

SIP Frequency (✓) ☐ Daily ☐ Weekly$ ☐ Fortnightly ☐ Monthly (Default) ☐ Quarterly SIP Debit Date D D #(Any date from 1st to 28th of a given month)

Payment Mode **One Time Mandate**

Bank Name _____ Account No. _____

$Weekly SIP Frequencies are applicable for normal SIP and not for Flex SIP & Pause Facility. #For weekly frequency, from Monday to Friday are eligible of every month.

4. SIP MODIFICATION DETAILS

New Scheme /Plan/Option _____ Plan (✓) ☐ Direct ☐ Regular

New SIP Amount(₹) _____ Amount in words (₹) _____

New SIP Frequency (✓) ☐ Daily ☐ Weekly$ ☐ Fotnightly ☐ Monthly (Default) ☐ Quarterly New SIP Debit Date D D (Any date from 1st to 28th of a given month)

New SIP End Date* D D M M Y Y Y Y

$Weekly SIP Frequencies are applicable for normal SIP and not for Flex SIP & Pause Facility.
***END DATE** is mandatory and should be less than or equal to 40 years from the application date.

Sign Here	First / Sole Applicant / Guardian / Authorised Signatory	Second Applicant / Authorised Signatory	Third Applicant / Authorised Signatory

INSTRUCTIONS

1. In order to provide flexibility, an investor investing through SIP shall have an option to modify the selected scheme and / or SIP instalment amount and / or SIP end date, or SIP Frequency, or SIP Cycle date, in the scheme wherein the SIP investments are currently being made.
2. Request has to be submitted atleast 10 days prior to the next SIP installment date (excluding the request date and the next SIP installment date).
3. Modify SIP facility shall be available only to investors whose SIP is registered through One Time Bank Mandate / Invest Easy Mandate.
4. Modify SIP request shall be liable for rejection if the modified details do not meet the amount / tenure conditions as per the Scheme Information Document of the respective scheme or the registered mandate.
5. If the investor submits request for Modify SIP details for a SIP registration where the STEP-UP facility is already registered, The Wealth Company STEP UP facility shall be cancelled immediately upon receipt of Modify SIP details request.
6. 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.

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SIP MODIFICATION APPLICATION FORM- ACKNOWLEDGMENT (To be filled by investor)

Received from Mr./Ms./Mrs. _____ SIP modification request for

SIP registered for Rs. _____ in Folio No. _____ under The Wealth Company_____

with _____ frequency and _____ Debit Date.

Stamp & Signature

New Scheme /Plan/Option _____ Plan (✓) ☐ Direct ☐ Regular

New SIP Amount(₹) _____ Amount in words (₹) _____

New SIP Frequency (✓) ☐ Daily ☐ Weekly$ ☐ Fotnightly ☐ Monthly (Default) ☐ Quarterly New SIP Debit Date D D (Any date from 1st to 28th of a given month)

New SIP End Date* D D M M Y Y Y Y

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.