



TATA MUTUAL FUND
Mafatlal Centre 9th Floor Nariman Point Mumbai - 400 021
SYSTEMATIC WITHDRAWAL PLAN FORM

**1. INVESTOR DETAILS**

Folio No. _____

1 st Holder Name			PAN		
Aadhaar No.	Date of Birth	C-KYC	Mobile No.		
_____	DD / MM / YYYY	_____	_____		
2 nd Holder Name			PAN		
Aadhaar No.	Date of Birth	C-KYC	Mobile No.		
_____	DD / MM / YYYY	_____	_____		
3 rd Holder Name			PAN		
Aadhaar No.	Date of Birth	C-KYC	Mobile No.		
_____	DD / MM / YYYY	_____	_____		

2. PURPOSE OF FORM (tick any one)

<input type="checkbox"/> Fresh Registration	<input type="checkbox"/> Change in the Withdrawal Amount	<input type="checkbox"/> Cancellation
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3. SYSTEMATIC WITHDRAWAL DETAILS**Scheme Details**

Scheme / Plan / Option

Withdrawal Plan Details (Select any one)

<input type="checkbox"/> Fixed Amount Withdrawal Plan	Amount in Rs. ₹ _____	Amount in Words _____
<input type="checkbox"/> Capital Appreciation Withdrawal Plan		

Withdrawal Frequency (Select any one)

<input type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Half Yearly	<input type="checkbox"/> Annually (Default)
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Enrolment Period

Start Date	End Date	Withdrawal Date (Any date between 1st and 31st - default 25th)
DD / MM / YYYY	DD / MM / YYYY	DD in words _____

4. PAYMENT BANK DETAILS FOR SWP (Registered in the folio)

For Investors who have registered for Multiple Bank Accounts facility in the above folio (Please strike off the section if not used). The SWP payout should be prescribed into the following bank account as per the payout mechanism indicated me/us.

Bank Name		
Branch	City	PIN
Account number	A/C type <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRNR <input type="checkbox"/> NRE	
MICR	IFSC for NEFT	IFSC for RTGS

Note: If the bank account mentioned above is different from those already registered in your folio OR if the bank account details are not filled above, the SWP payout will be processed into the "Default" bank account registered for the aforesaid folio.

5. DECLARATION AND SIGNATURES

I/We have read, understood and hereby agree to comply with the terms and conditions of the scheme related documents including the key information Memorandum and apply for allotment of Units of the Scheme(s) of Tata Mutual Fund ("Fund") indicated in this application form. I/We will indemnify the Fund, AMC, Trustee, RTA and other intermediaries in case of any disputes regarding the eligibility, validity and authorization of my/our transactions. The ARN holder (AMFI registered Distributor) has disclosed to me / us all the commissions (in the form of trail commission or any other mode), payable to him / them for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. I/We hereby confirm that I/We have not been offered / communicated any indicative portfolio and/ or any indicative yield by the Fund/AMC/its distributor for this investment.

I/We, the holder of the above stated Aadhaar number, hereby give my consent to Tata Mutual Fund(TMF), to obtain my Aadhaar number, Name and Fingerprint/Iris for authentication with UIDAI, use my mobile number mentioned in my account for sending SMS alerts to me. I/We hereby provide my consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (ii) updating my/our Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA. I/We hereby provide my/our consent for sharing/disclosure of the Aadhaar number(s) including demographic information with the asset management companies of SEBI registered mutual fund and their Registrar and Transfer Agent (RTA) for the purpose of updating the same in my/our folios with my PAN. Date _____

1 st Applicant Signature / Thumb Impression	2 nd Applicant Signature / Thumb Impression	3 rd Applicant Signature / Thumb Impression
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Acknowledgement Slip

Sr. No.:



Received from Mr./Ms./M/s. _____ Folio No. _____ SWP request
from Scheme _____ for ₹ _____

Subject to verification.