



Distributor ARN	Sub-Distributor ARN	Internal Sub-Broker/ Sol ID
EUIN	Employee Code	RIA CODE^

PMR (Portfolio Manager's Registration) Number ^^

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. ^I/We, have invested in the scheme(s) of Monarch Mutual Fund under Direct Plan. I/We hereby give 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 of Monarch Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. ^^I/We, have invested in the scheme(s) of Monarch Mutual Fund under Direct Plan. I/We hereby give 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 of Monarch Mutual Fund, to the above mentioned SEBI Registered Portfolio Manager.

☐ "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."

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
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☐ I confirm that I am a first time investor across Mutual Funds. **OR** ☐ I confirm that I am an existing investor across Mutual Funds.

1. Applicant Details

Folio No.

Sole / 1st Unitholder. (as in PAN Card / KYC records)			
Guardian's Name (as case of minor)	First Name	Middle Name	Last Name
1st Holder PAN	2nd Holder PAN	3rd Holder PAN	

2. SWP Details (To be submitted atleast 8 working days before 1st due date. Please (✓) the appropriate option)

SWP From Scheme

Plan ☐ Regular ☐ Direct ☐ Option* ☐ Growth ☐ IDCW - Payout *Kindly refer Scheme Information Document (SID) for the scheme you are investing with to determine the available Plan Option. In case you select an unavailable option, transaction will be processed in growth mode.

Withdrawal Amount ₹ In figures ₹ In words

Minimum Amount of Instalment: INR 1000 and in multiples of INR 1/- thereafter

Withdrawal Frequency ☐ Monthly (minimum 2) ☐ Quarterly (minimum 2) ☐ Half Yearly (minimum 2) ☐ Yearly (minimum 2)

Withdrawal Period From To OR No. of installments

*Transaction Date : Any date of every month (between 1st and 28th) *In the event that such a day is a holiday, the withdrawal would be affected on the next business day.

3. Declaration and Signatures

Having read and understood the content of the SID / SAI of the scheme, I/we hereby apply for units of the scheme. I have read and understood the terms, conditions, details, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate source only and does not involve designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directives of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the Government of India from time to time. I/we have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment. I/We confirm that the funds invested in the Scheme, legally belongs to me/us. In event "Know Your Customer" process is not completed by me/us to the satisfaction of the Mutual Fund, (I/we hereby authorize the Mutual Fund, to redeem the funds invested in the Scheme, in favour of the applicant, at the applicable NAV prevailing on the date of such redemption and undertake such other action with such funds that may be required by the law.) The ARN holder has disclosed to me/us all the commissions (trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds amongst which the Scheme is being recommended to me/ us. For NRIs only - I / We confirm that I am/ we are Non Residents of Indian nationality/origin and that I/We have remitted funds from abroad through approved banking channels or from funds in my/ our Non Resident External / Non Resident Ordinary / FCNR account. I/We confirm that details provided by me/us are true and correct

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
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To be signed by All Applicants if mode of operation is 'Joint'

Acknowledgement Slip (To be filled in by the investor)

Folio No.		Investor Name		Stamp & Signature
From Scheme				
Amount		Frequency		

Instruction & Information

1. Please refer the Key Information Memorandum Scheme information documents and Statement of additional information of the respective Schemes(s) for Applicable NAV, Risk Factors, Load Structure and other information on the Scheme(s)
2. A minimum period of 8 days shall be required for registration under SWP. In case the required time of 8 calendar days are not met, then the SWP will be processed from the next SWP cycle.
3. The SWP frequencies available under the Scheme are as follows:

Frequency	Cycle Day /Date*	Default Day /Date	Minimum Instalment Amount (in ₹)	Minimum Instalments
Fortnightly	7 th & 21 st of the Month	7 th & 21 st of the Month	₹ 1000 & in multiples of ₹ 1/- thereafter	6
Monthly	Any date except 29 th , 30 th & 31 st of the Month	8 th of the Month	₹ 1000 & in multiples of ₹ 1/- thereafter	6
Quarterly	Any date except 29 th , 30 th & 31 st of the Month	8 th of the Month	₹ 1000 & in multiples of ₹ 1/- thereafter	6

*In case any of these days fall on a non-business day, the transaction will be effected on the next business day of the Scheme

4. Units marked under Lien, Pledge or Lock-in Period in the Transferor scheme will not be eligible for SWP.
5. All valid applications will be processed as per the applicable uniform cut off timings on the working days as mentioned in the respective scheme SID.
6. If the required minimum balance is not available in the scheme for 3 consecutive attempts, the SWP registered will be terminated. Also the SWP will be automatically terminated if all units are liquidated or withdrawn from the Scheme or pledged or upon receipt of intimation of death of the unit holder.
7. The Load Structure prevailing at the time of submission of the SWP application will apply for all the instalments indicated in such application.
8. Unit holders will have the right to discontinue the SWP facility at any time by sending a written request to the Customer Service Centres (CSC) of the AMC or its Registrar. Notice of such discontinuance should be received at least 8 days prior to the due date of the next transfer date. On receipt of such request, the SWP facility will be terminated.
9. The Default bank account as mentioned in the above folio would be considered for such credits. In case you wish to change the bank account fill in a Change of Bank Account form.
10. Incorrect, incomplete, ambiguous forms will be rejected.