




Distributor's ARN/ RIA Code*	Sub-Broker's ARN	Folio No.	EUIN	Date
				<div style="display: flex; justify-content: space-between;"> <div>DD</div> <div>MM</div> <div>YYYY</div> </div>

- ☐ By mentioning RIA/PMS code, I/ We authorize you to share with the Investment Adviser/ Portfolio Manager the details of my/our transactions in the scheme(s) of Kotak Mahindra Mutual Fund.
- ☐ Declaration for "Execution-only" transactions (only where EUIN box is left blank): "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."

<div style="text-align: center;">  Sole/First Holder </div>	<div style="text-align: center;">  Second Holder </div>	<div style="text-align: center;">  Third Holder </div>
(To be signed by All Unitholders if mode of operation is 'Joint')		

Upfront commission shall be paid directly by the investor to the AMFI registered distributors based on the investor's assessment of various factors including the service rendered by the distributor.

NAME OF SOLE/ FIRST HOLDER: _____

NAME OF SECOND HOLDER: _____

NAME OF THIRD HOLDER: _____

SIP Pause Details:

Scheme/ Plan

Option ☐ Growth ☐ IDCW ☐ Pay-out ☐ Re-investment IDCW Frequency

SIP Period From To

SIP Date

SIP Frequency ☐ Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

SIP Amount, Rs. (Please ✓) ☐ 1,000 ☐ 2,000 ☐ 3,000 ☐ 5,000 ☐ 10,000 Any other amount Rs.

SIP Pause Start Date

No. of Months to Pause SIP ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6

SIP Pause Reasons: ☐ Non availability of funds ☐ Scheme not performing ☐ Service issue ☐ Load revised
☐ Wish to invest in other scheme ☐ Change in Fund Manager ☐ Goal achieved ☐ Higher Studies
☐ Buying a Property ☐ Wedding Occasion ☐ Medical Emergency
☐ Others specify _____

Please note that SIP shall restart from the immediate month after completion of the PAUSE Period

SIP Cease Details:

Scheme/ Plan

Option ☐ Growth ☐ IDCW ☐ Pay-out ☐ Re-investment IDCW Frequency

SIP Period From To




SIP Date

SIP Frequency ☐ Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

SIP Amount, Rs. (Please ✓) ☐ 1,000 ☐ 2,000 ☐ 3,000 ☐ 5,000 ☐ 10,000 Any other amount Rs.

SIP Cease Start Date

SIP Cease Reasons: ☐ Non availability of funds ☐ Scheme not performing ☐ Service issue ☐ Load revised
☐ Wish to invest in other scheme ☐ Change in Fund Manager ☐ Goal achieved ☐ Higher Studies
☐ Buying a Property ☐ Wedding Occasion ☐ Medical Emergency
☐ Others specify _____

<div style="text-align: center;">  First or Sole Applicant/Unitholder </div>	<div style="text-align: center;">  Second Applicant/Unitholder </div>	<div style="text-align: center;">  Third Applicant/Unitholder </div>
(To be signed by All Applicants/ Holders if mode of holding is Joint)		

INSTRUCTIONS/ TERMS & CONDITIONS

1. The applicant will have the right to Pause/ Cease SIP which is directly registered with KMMF
2. An investor who wishes to request for SIP Pause/ Cease facility shall duly fill the SIP Pause/ Cease Form and submit the same at the office of the Customer Service Centres of KMMF or CAMS Service Centre.
3. Request for SIP Pause/ Cease, should be submitted 10 calendar days prior to the next SIP date
4. In case an investor wishes to 'Pause/ Cease' multiple SIPs registered in his folio(s), then he needs to submit a separate SIP Pause/ Cease form for each registered SIP.
5. SIP Pause facility would allow existing investor to 'Pause' their SIP for a specified period of time i.e. Minimum 1 month & Maximum 6 months.
6. There would be no restriction on the number of times of submission of SIP Paused request.
7. The SIP shall continue from the subsequent instalment after the completion of pause period automatically.
8. If the SIP pause period is coinciding with the SIP Top Up facility, the SIP instalment amount post completion of pause period would be inclusive of SIP Top Up amount.
For e.g. SIP instalment amount prior to pause period is Rs. 5,000 and SIP Top Up amount is Rs. 1,000. If the pause period is completed after date of SIP Top Up, then the SIP instalment amount post completion of pause period shall be Rs. 6,000.
9. Incomplete SIP Pause/ Cease Form in any respect would be liable to be rejected.
10. The investor hereby agrees to indemnify and not hold responsible, the AMC and its employees, the R&T agent and the service providers in case his/ her bank is not able to effect any of the payment instructions for whatsoever reason.
11. SIP Pause is a facility that gives an option to 'pause' the existing SIP for a period ranging from 1 month to 6 months.
12. Auto Cancellation of SIPs:
 - SIP will be ceased after 3 consecutive rejections for Daily, Weekly, and Monthly Frequency
 - SIP will be ceased after 2 consecutive rejections for Quarterly, Half yearly and Yearly Frequency.Communication will be sent to the investor after 1st failed attempt mentioning that the SIP will be ceased in case of three consecutive rejections for daily, weekly, monthly frequency and two consecutive rejections for quarterly, half-yearly and yearly and another communication will be sent to the investor after cancellation of SIP.