**ANNEXURE**

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| **PLEASE FILL THE FORM WITH BLACK BALL PEN only.** | |
| Client Name: |  |
| Marital Status: | Single Married |
| Maiden Name (If Any):  (For Female Clients only) |  |
| Mother Name: |  |
| Address: |  |
| Place of Birth (Name of city) |  |
| Personal Mobile No. |  |
| Personal Email ID.: |  |
| Occupation: | 1. Pvt. Sector 5) Agriculture 9) Professional 2. Public Sector 6) Retired 10) Others 3. Government 7) Housewife 11) Non Categorized 4. Business 8) Student 12) Self Employed |
| Work Profile |  |
| Annual Income Range: | * 1. Lac 1-5 Lac More than 25 Lac.   5-10 Lac 10-25 Lac More than 1 Cr. |
| Net Worth: | 1 - 5 Lac 10 - 25 Lac 50 – 1 Cr  5 - 10 Lac 25 – 50 Lac More than 1 Cr. |
| Nominee Name: | Relation:  Date of Birth: |
| **TAX Identification Number: (Other than India – Applicable only for NRI** | **Country:**  **(Specify Identification Type – TIN. Please specify.)** |
| Preferred SIP Dates: |  |

**Documents required List**

|  |  |  |  |
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| **Sr. No.** | **List** | **Copies** | **Ticks** |
| 1. | PAN CARD - Self Attested | 3 nos. |  |
| 2. | ADDRESS PROOF – Self Attested (Or Any other Indian Address Proof Self attested) | 3 nos. |  |
| 3. | PASSPORT SIZE PHOTOS | 3 nos. |  |
| 4. | ORIGINAL NRO BANK CANCELLED CHEQUE | 3 nos. |  |
| 5. | PASSPORT COPY – Self Attested | 3 nos. |  |
| 6. | OVERSEAS ADDRESS PROOF – Self Attested | 3 nos. |  |