

SYSTEMATIC WITHDRAWAL PLAN OR SYSTEMATIC TRANSFER PLAN OR DIVIDEND SWEEP OPTION

(Please read instructions carefully before filling up the form)

Please (✓) any one. ☐ Systematic Withdrawal Plan ☐ Systematic Transfer Plan ☐ Dividend Sweep Option

1. DISTRIBUTOR / BROKER INFORMATION

Name & Broker Code / ARN	Sub Broker / Sub Agent Code
132061	

FOR OFFICE USE ONLY

Date and Time of Receipt

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

2. UNIT HOLDER INFORMATION

FOLIO NO. Name of First/Sole Applicant Mr. Ms. M/s. PAN Enclosed (please ✓) ☐

KYC Acknowledgement

Name of Second Applicant Mr. Ms. Name of Third Applicant Mr. Ms.

NAME OF THE GUARDIAN (For minor applicant) / Name of the POA Holder / Name of the Contact Person (For Non Individual Applicant)

Mr. Ms. M/s. Designation of Contact Person Enclosed (please ✓) ☐

KYC Acknowledgement

3. SYSTEMATIC WITHDRAWAL PLAN (SWP)

I/We wish to redeem units through Systematic Withdrawal Plan in above-referred folio as per details below

Scheme Name	Plan	Option
Withdrawal preference <input type="checkbox"/> Fixed Amount <input type="checkbox"/> Fixed No. of Units		
Withdrawal Amount/Units	X No. of Installments	= Total Withdrawal
Frequency (Please ✓) <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> SWP Date (Please ✓) <input type="checkbox"/> 1st <input type="checkbox"/> 5th <input type="checkbox"/> 10th <input type="checkbox"/> 15th <input type="checkbox"/> 28th		
Period of enrolment (MM / YY) From <input type="text"/> To <input type="text"/>		

4. SYSTEMATIC TRANSFER PLAN (STP)

I/We wish to switch units through a Systematic Transfer Plan in above-referred folio as per details below

From	Scheme	Plan	Option
To	Scheme	Plan	Option
Transfer preference <input type="checkbox"/> Fixed Amount <input type="checkbox"/> Fixed No. of Units			
Transfer Amount/Units <input type="text"/> No. of Instalments <input type="text"/>			
Frequency (✓) <input type="checkbox"/> Daily <input type="checkbox"/> Weekly (Friday) <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly			
STP Date (✓) Monthly / Quarterly <input type="checkbox"/> 1st <input type="checkbox"/> 5th <input type="checkbox"/> 10th <input type="checkbox"/> 15th <input type="checkbox"/> 28th			
Enrolment From <input type="text"/> To <input type="text"/>			

5. DIVIDEND SWEEP OPTION (DSO)

I/We wish to Transfer the dividends declared as per the details below

From	Scheme	Plan	Option
To	Scheme	Plan	Option

DISCLAIMER

I / We have read and understood the contents of the Scheme Information Document(s) of the respective Scheme(s) and Statement of Additional Information and the terms & conditions overleaf. I / We hereby apply to the Trustee of Taurus Mutual Fund for enrolment under the SWP / STP / Dividend Sweep of the Scheme(s) / Plan(s) / Option(s) and agree to abide by the terms and conditions of the respective said Scheme(s) / Plan(s) / Option(s). 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.

Please Sign here

First / Sole Applicant / Guardian / POA Holder / Auth. Sign

Please Sign here

Second Applicant / Auth. Sign

Please Sign here

Third Applicant Sign

ACKNOWLEDGEMENT - SWP/STP/DSO Form

TAURUS MUTUAL FUND


TAURUS
Mutual Fund
Folio No. Received from Mr./Ms./M/s. Received for ☐ SWP ☐ STP ☐ Dividend SweepScheme / Plan / Option Amount or Units Acknowledgement Stamp/
Time Stamp