



ARN: ______ (In case of existing ARN holders)

Please fill this form in ENGLISH and in BLOCK LETTERS (All Information as applicable in Sections A, B and C below is mandatory)

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For Office Use Only

(Name & Location)

Receiver's Signature

Marrie and Employee Mumber of Receiver

KYD Ref

 $\hfill \square$ Self Certified Document copies received, verified with originals

IMPORTANT NOTES - PLEASE READ BEFORE FILLING UP THE FORM

- This Application Form is meant to enable a Mutual Fund Distributor to comply with the KYD requirements. It is for use by INDIVIDUALS only. A separate form is provided for non-individual entities such as Hindu Undivided Family (HUF), Corporates, Trusts, Societies, etc.
- This form is not an ARN Registration Form and is only meant for providing information and documents required for KYD compliance. Applicant must be KYD compliant while applying for ARN Registration. A separate form for ARN registration is available on AMFI Website www.amfiindia.com.
- Application for ARN registration can be made only after obtaining the KYD Acknowledgement from the designated Points of Service and applicants must attach their KYD Acknowledgement along with the ARN application.
- 4. The KYD process requires Mutual Fund Distributors to provide their Proof of identity (PAN card copy only) and Proof of Address (any valid documents listed in section B of the KYD application Form) to

- comply with KYD applications. AMFI reserves the right to seek any additional information / documentation.
- 5. AMFI/CAMS will not be liable for any errors or omissions on the part of the applicant in the KYD Application Form. Documents received in support of KYD applications will be verified at the designated "Points of Service" (PoS), on a best effort basis. However acceptance and processing of the KYD Application Form is subject to independent verification by CAMS. In the event of any KYD Application Form being rejected for lack of information/ deficiency/ insufficiency of mandatory documentation, etc. CAMS will inform the applicant of such rejection. In case where KYD application is submitted alongwith ARN registration/ Renewal form, the processing of same shall be kept pending till the deficiencies in KYD application forms are removed.
- Once the existing ARN holders are KYD compliant, they will be required to intimate their KYD details to all the Mutual Funds with which they are empanelled.

GUIDELINES FOR FILLING UP THE KYD APPLICATION FORM

General

- 1. The Application Form should be completed in **ENGLISH** and in **BLOCK LETTERS**.
- 2. Please tick in the appropriate box wherever applicable.
- Please fill the form in legible handwriting so as to avoid errors in your application processing. Please do not overwrite. Corrections should be made by canceling and re-writing, and such corrections should be counter-signed by the applicant.
- Applications incomplete in any respect and/or not accompanied by required documents are liable to be rejected.
- Applications complete in all respects and carrying necessary documentary attachments should be submitted at the designated PoS. A complete list of PoS is available on the website of AMFI at www.amfiindia.com, as well as CAMS www.camsonline.com.
- 6. You are required to submit a Proof-of-Identity document (PAN card is the only document which can be submitted) and a Proof-of-Address document for address filled by you in this form. Documents submitted to support Identity and Address should be

i. Proof of Identity

 Original PAN Card + Self-attested photocopies (Originals will be returned over-the-counter after verification)

ii. Proof of Address

 Original Documents + Self-attested photocopies (Originals will be returned over-the-counter after verification)

A. Identity Details

- 1. Name: Please state your name as Title (Mr / Mrs / Ms / Dr / Commander / etc.), First, Middle and Last Name in the space provided. This should match with the name as mentioned in the PAN card failing which the application is liable to be rejected. If the PAN card has a name by which the applicant has been known differently in the past, than the one provided in this application form, then requisite proof should be provided e.g. marriage certificate, or gazetted copy of name change.
- 2. Date of Birth: Please ensure that this matches with the Date of Birth as indicated in the PAN card.
- 3. Status: Please tick your current residential status.
- 4. PAN: PAN is mandatory to be KYD compliant. Please read instruction given in 6(i) above carefully
- Please affix most recent colour photograph and sign across the photograph.

B. Address and Bank Details

- Contact Details: Please provide your Telephone / Email contact details.
- 2. Proof of Address Documents: Please note that address mentioned by you will need to be supported by a 'Proof-of-Address' bearing your or your spouse's / parent's (documents to establish relationship also to be submitted) name as supporting documents. Please tick the box as applicable, for the document provided by you. You may attach any one of the following documents (Any document having an expiry date should be valid on the date of submission):
 - Latest* Telephone Bill Latest* Electricity Bill Passport Driving License Latest** Bank Passbook Latest** Bank Account Statement Voter Identity Card Ration Card Latest* Demat Account Statement Registered Lease / Sale Agreement of residence
 - * These documents should not be more than two months old as on the date of submission of this form.
 - ** Where bank account statement is submitted as proof of address, the said bank account should have been opened at least six months prior to the submission of application and the statement should not be more than 2 months old.
- Proof of Bank details: Please attach a copy of cancelled cheque. If the name of the account holder is not mentioned on the cheque leaf, then also attach a copy of bank statement/ bank pass book.

C. Other details

1. Occupation details: Please indicate your current occupation/ s by ticking the appropriate box/ es applicable to you.

After you have completed filling up the KYD Application Form, please submit alongwith the entire set of supporting documents and xerox copy of the KYD application form to any designated PoS and obtain back a duplicate copy of KYD application form with receipt stamp of POS for your record purpose. Other important notes:

After the KYD Acknowledgement is issued to you :

- If you observe any discrepancy/ error in the details mentioned in KYD, you are requested to approach your nearest designated CAMS-PoS/ AMFI.
- After issue of KYD acknowledgement, if there are any changes in an Applicant's details such as Name, Address, Status, Occupation or Signature, the change should be registered with CAMS through a designated PoS expeditiously, by using the KYD Details Change form. Original / Attested copies of documents supporting the change will be required to be submitted together with the KYD Details Change Form.

CHECKLIST

(Before submitting this form, please go through the following checklist)

- 1. Please ensure that the form is completed in all respects and signed by you.
- 2. Please affix your recent photograph and sign across the photograph.
- 3. Please attach a copy of your PAN card as proof of Identity Document. This should be a photocopy plus original for verification.
- 4. Please attach a Proof of address Document. This should be a photocopy plus original for verification.
- 5. Please attach a proof of bank details. This should be photocopy plus original for verification.
- 6. Please submit a photocopy of the duly completed KYD Application Form.