

Common Transaction Slip

Code : 13595



WEALTH FIRST
PORTFOLIO MANAGERS LIMITED

ACKNOWLEDGEMENT

Date :

Sole / First

Unit Holder's Name

Folio No.

Scheme

Plan

Additional Purchase

Amount :

Cheque No.

Bank Name

Redemption or **Switch**

Amount

or

Units

- **Change of Bank Account**

- **Change in Address**

Common Transaction Slip

Code : 13595

EUIN:



WEALTH FIRST
PORTFOLIO MANAGERS LIMITED

Date :

Sole / First Unit Holder's Name : **FUND NAME :**

Folio No. **Scheme :** **Plan :** **Option :**

Fist Unit Holder

Second Unit Holder

Third Unit Holder

PAN

PAN

PAN

ADDITIONAL PURCHASE REQUEST

Amount (in Rs.) (in words)

Drawn on Branch

Cheque/DD/ No. Dated

Bank account Type (please ✓) Savings Current NRE NRO

SWITCH REQUEST INTER AND INTRA SCHEME -Subject to Lock-in-Period, if any

Please Switch (Please ✓)

All Units No. of Units

Amount (in Rs.) (in words)

From Scheme Plan Option

To Scheme Plan Option

REDEMPTION REQUEST - Subject to Lock-in Perod, if any

Please redeem

(Please) All Units No. of Units

Amount (in Rs.)

(in words)

EMAIL / SMS SERVICES

Please send my (Please) Account Statment

Newsletters Annual Report Other Statutory information

by email insted of physical documents.

My/our email ID is

My Mobile No. is

Signature(s)

Sole/First Unit Holder/Guardian

Second Unit Holder
(in case of joint-holding, all Unit holders must sign)

Third Unit Holder

Important : 1. Investors are advised to read the Offer Document(s) of the respective Scheme(s) carefully and appraise themselves of the prevailing load structure before investing/switching. 2. Please refer to the notes mentioned on the reverse of the account statement. 3. If the balance in the account of the Unit holder does not cover the amount of the redemption request then the Mutual Fund is authorised to close the account of the Unit holder and send the entire such (lesser) balance to the Unit holder. 4. Investors are advised to consult their tax advisors regarding tax implications before investing / redeeming switching Units. Upfront commission shall be paid directly by the Investor to the AMFI-registered distributors based on the investors assessment of various factors including service rendered by the distributor.

Common Transaction Slip

Code : 13595



WEALTH FIRST
PORTFOLIO MANAGERS LIMITED

Sole / First Unit Holder's Name : _____ FUND NAME : _____

Folio No. _____ Scheme : _____ Plan : _____ Option : _____

CHANGE OF BANK ACCOUNT DETAILS

(Please attach cancelled / photocopy of Cheque / Bank Letter confirming new bank account details)

A/c. No.

Bank Name

Branch Name

& Address

City Pin Code

A/c. Type (Please Savings Current NRE NRO FCNR

9 Digit MICR Code for ECS :

11 Digic IFSC Code :
for RTGS / NEFT

CHANGE IN CORESPONDENCE ADDRESS

City Pin : State :

Tel : (Office) (Res.)

Facsimile : Mobile :

Signature(s)

Sole/First Unit Holder/Guardian

Second Unit Holder
(in case of joint-holding, all Unit holders must sign)

Third Unit Holder