

Please read the instructions overleaf carefully and complete the relevant sections legibly in black / dark coloured ink and in BLOCK LETTERS.
Please strike off unused section(s) to avoid unauthorised use

<input type="radio"/> New Registration <input type="radio"/> Cancellation	Date: <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		

1. EXISTING UNITHOLDER(S) INFORMATION*									
Existing Folio No.		*Mandatory	Permanent Account Number (PAN)						
Name of the Unit Holder [Please Tick (✓)]									
<input type="radio"/> Mr. <input type="radio"/> Ms. <input type="radio"/> M/s.									
Email Id									

2. SYSTEMATIC WITHDRAWAL PLAN ("SWP") DETAILS* (Refer Section 'A' of instructions) [Please Tick (✓)]																	
Scheme	U N I O N																
Plan	<input type="radio"/> Direct Plan <input type="radio"/> Regular Plan/ Other than Direct Plan																
Option	<input type="radio"/> Growth <input type="radio"/> Payout of IDCW <input type="radio"/> Transfer of IDCW <input type="radio"/> Reinvestment of IDCW (IDCW - Income Distribution cum Capital Withdrawal)																
Withdrawal Amount in ₹ (Figures)	Withdrawal Amount in ₹ (words)																
Withdrawal Frequency	<input type="radio"/> Daily <input type="radio"/> Monthly (Default) <input type="radio"/> Quarterly <input type="radio"/> Half yearly <input type="radio"/> Yearly																
Withdrawal Period	From <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> </tr> </table> To <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">M</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> <td style="width: 20px; height: 20px;">Y</td> </tr> </table> OR <input type="radio"/> Till Further Instruction* (Default)	D	D	M	M	Y	Y	Y	Y	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y										
D	D	M	M	Y	Y	Y	Y										
SWP Date ⁵	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;">D</td> <td style="width: 20px; height: 20px;">D</td> </tr> </table> ⁵ If day or date chosen for SWP falls on a Non-Business Day, the SWP will be processed on the immediate next Business Day.	D	D														
D	D																
<small>* If the SWP end date is not selected by the investor, then the SWP will continue till further instructions are received from the investor or till all units are liquidated or withdrawn from the account or pledged or upon the notification of death of the Unit holder is received by the AMC.</small>																	

3. PAYMENT OF SWP PROCEEDS									
Redemption proceeds through SWP will be credited to the default bank account registered in the Folio. If you wish to receive the redemption proceeds into any other bank account registered in the Folio, please mention the Bank Account No. and Name below:									
Account No.									
Bank Name & Branch									
(If the above mentioned bank details do not match with the registered bank account in your Folio, proceeds will be credited to the default bank account registered in the Folio.)									

4. DECLARATION & SIGNATURES* (Refer Section 'B' of instructions)									
<p>I/We have read and understood the contents of the Scheme Information Document and Statement of Additional Information, Key Information Memorandum, Instructions and addenda issued by Union Mutual Fund, I/ We, hereby apply to the Trustee of Union Mutual Fund for Systematic Withdrawal Plan ("SWP") under the relevant Scheme and agree to abide by the terms and conditions, rules and regulations of the Scheme. I/ We hereby agree that any transaction processed under the Systematic Withdrawal Plan will be binding upon me/us. I/We will not hold the AMC/the Trustee Company/ the Mutual Fund / the Sponsor liable for any transaction processed under the SWP. I/ We have neither received nor been induced by any rebate or gifts, directly or indirectly in opting for this facility. I/ We declare that the amount invested in the Scheme is through legitimate sources only and is not designed for the purpose of contravention or evasion of any Act, Regulation, Rule, Notification, Directions or any other applicable laws enacted by the Government of India or any Statutory Authority. I/ We hereby confirm that Union Mutual Fund/ Union Asset Management Company Private Limited and its empanelled broker(s) has not given any indicative portfolio and indicative yield, in any manner whatsoever. I/ We have the express authority to transact in units of the Scheme and the AMC/ Trustee / Mutual Fund/ Sponsor will not be responsible if such transaction is ultravires the relevant constitution.</p>									
Signature Sole / First Applicant / Guardian / POA / Authorised Signatory	Signature Second Applicant / POA / Authorised Signatory	Signature Third Applicant / POA / Authorised Signatory							

ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Folio No.

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Ref. No.	
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Received from: Mr./ Ms./ M/s _____ Date: / /

Application for Systematic Withdrawal Plan

Scheme/ Plan/ Option - _____

SWP Period	From		To		OR	<input type="radio"/> Till Further Instruction (Default)
Amount in ₹						

Collection centre's stamp with
date and time of receipt

INSTRUCTIONS

General

1. This form should be used by existing investors only by mentioning their folio number, name and scheme details. Please read the Statement of Additional Information (SAI), respective Scheme Information Document (SID) including Addendum(s) thereto, if any, Key Information Memorandum (KIM) and instructions there-in and below mentioned instructions carefully before filling up this form.
2. This Form should be completed in English and in Block Letters only using black or blue coloured ink.
3. Please tick (✓) in the appropriate circle (O).
4. The Form should be complete in all respects & should be submitted at any of the Customer Service Centres (CSCs) / Official Points of Acceptance (OPAs) of Computer Age Management Services Ltd. (CAMS) or Union Mutual Fund. List of OPAs is available on the website of the Mutual Fund www.unionmf.com.
5. Signature(s) should be as provided under the existing folio and in the same order. In case the mode of holding is joint, all unit holders are required to sign.
6. If any chosen day falls on a non-business day, the next business day of the scheme will be considered as the transaction date.
7. Incorrect / Incomplete applications are liable to be rejected.
8. Default Option may be applied in case of no information, ambiguity or discrepancy.
9. The AMC reserves the right to change/modify the terms and conditions of SWP.
10. The Load Structure prevailing at the time of submission of the SWP application will apply for all the installments indicated in such application.

A. Systematic Withdrawal Plan (SWP)

1. A minimum period of 8 days shall be required for registration under SWP. In case the required time of 8 calendar days are not met, then the SWP will be processed from the next SWP cycle.
2. The SWP frequencies available under the Scheme are as follows:

Frequency	Cycle Day / Date*	Default Day / Date	Minimum Instalment Amount (in ₹)	Minimum Instalments
Daily	Daily (Only Business Day)	Not Applicable	₹ 1000 & in multiples of ₹ 1/- thereafter	6
Monthly/ Quarterly/ Half Yearly/ Yearly	Any date of the month.	8 th of the month.	₹ 1000 & in multiples of ₹ 1/- thereafter	6

*In case any of these days fall on a non-business day, the transaction will be effected on the next business day of the Scheme

3. Units marked under Lien, Pledge or Lock-in Period in the Transferor scheme will not be eligible for SWP.
4. All valid applications will be processed as per the applicable uniform cut off timings on the working days as mentioned in the respective scheme SID.
5. If the required minimum balance is not available in the scheme for 3 consecutive attempts, the SWP registered will be terminated. Also the SWP will be automatically terminated if all units are liquidated or withdrawn from the Scheme or pledged or upon receipt of intimation of death of the unitholder.
6. Unit holders will have the right to discontinue the SWP facility at any time by sending a written request to the Customer Service Centres (CSC) of the AMC or its Registrar. Notice of such discontinuance should be received at least 8 days prior to the due date of the next transfer date. On receipt of such request, the SWP facility will be terminated.

B. Declaration and Signature(s)

1. Signature(s) should be in English or in any of the Indian languages specified in the eighth schedule of the Constitution of India.
2. Thumb impressions (left hand for males and right hand for female) and signatures in languages not specified in the Eighth Schedule of the Constitution of India should be attested by a Magistrate or a Notary public or a Special Executive Magistrate under his/ her official seal.
3. Applications by minors should be signed by their guardians.
4. In case of an HUF, the Karta should sign on behalf of the HUF.
5. If the application form is signed by a Power of Attorney (PoA) holder, the form should be accompanied by a notarised photocopy of the PoA. Alternatively, the original PoA may be submitted with the application, which will be returned after verification. If the PoA is not submitted with the application, the application form will be rejected.
6. In case of non-individual investors, a list of authorised signatories should be submitted along with application form in case of any change in the authorised signatories list.



Please address all future communication(s) in connection with this application to the Registrar & Transfer Agent of the Scheme:

Computer Age Management Services Ltd.,

Unit: Union Mutual Fund

Rayala Tower 2, 5th Floor, # 158 Anna Salai, Chennai - 600002.

Email: enq_uk@camsonline.com | Website: www.camsonline.com

Union Asset Management Company Pvt. Ltd.

Unit 503, 5th Floor, Leela Business Park, Andheri Kurla Road, Andheri (East), Mumbai - 400059.

Toll Free : 1800 200 2268/1800 572 2268 | Tel No. : 022 67483333

Website: www.unionmf.com | Email : investorcare@unionmf.com