|  |
| --- |
| **PERSONAL INFORMATION** |

**Full Name :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First Middle Last

**Date of Birth :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Address:**

|  |  |  |
| --- | --- | --- |
|  | **Permanent Address** | **Correspondence Address** |
| **Full Address** |  |  |
| **City** |  |  |
| **State** |  |  |
| **Country** |  |  |
| **Zip code** |  |  |

**E-mali:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mobile :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Alternet mobile:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Aadhar no.** \_\_\_\_\_\_\_-\_\_\_\_\_\_-\_\_\_\_\_\_\_ **Pan Card** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **EMPLOYMENT AND FINANCIAL INFORMATION** |

|  |  |
| --- | --- |
| **Employment Status** | ☐ Salaried ☐ Self-Employed ☐ Business Owner ☐ Retired ☐ Student ☐ Homemaker ☐ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Occupation** |  |
| **Name of Employer/Business** |  |
| **Annual Income** | ☐ Below ₹2,50,000  ☐ ₹2,50,001 - ₹5,00,000  ☐ ₹5,00,001 - ₹10,00,000  ☐ ₹10,00,001 - ₹25,00,000  ☐ Above ₹25,00,000 |
| **Source of Wealth** | ☐ Salary ☐ Business Income ☐ Inheritance ☐ Savings  ☐ Investments ☐ Other \_\_\_\_\_\_\_\_\_\_\_\_ |

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| **INVESTMENT PREFERENCES** |

|  |  |
| --- | --- |
| **Investment Opjective** | ☐ Capital Appreciation ☐ Regular Income ☐ Tax Saving  ☐ Retirement Planning ☐ Children’s Education  ☐ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Risk Appetite** | ☐ Low ☐ Moderate ☐ High |
| **Preferred Investment Horizon** | ☐ Less than 1 year ☐ 1-3 years ☐ 3-5 years ☐ More than 5 years |
| **Existing Investments** |  |

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| --- |
| **BANK DETAILS** |

|  |  |
| --- | --- |
| **Bank Name** |  |
| **Branch Name** |  |
| **Account Number** |  |
| **IFSC Code** |  |
| **Account Type** | ☐ Savings ☐ Current ☐ NRE ☐ NRO |

|  |
| --- |
| **NOMINEE DETAILS** |

|  |  |
| --- | --- |
| **Full Nominee Name** |  |
| **Nominee Relationship** |  |
| **Nominee Date of Birth** |  |
| **Nominee Address** |  |

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| --- |
| **DECLARATION AND CONSENT** |

**Declaration**:

I hereby declare that the information provided above is true and correct to the best of my knowledge and belief. I agree to the terms and conditions set forth by Ramkumar H Barchha, Mutual Fund Distributor.

**Consent for Communication:**

I consent to receive communication and updates from Ramkumar H Barchha via email, SMS, and phone calls.

**Signature :**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Submit Button**

This form is designed to capture all necessary details required for mutual fund investment, ensuring compliance with regulatory requirements and facilitating a smooth investment process.