

## Transfer-in application Form

(Applicable for folios purchased through Mutual Fund Distribution only)

DATE \_\_\_ / \_\_\_ / 20\_\_\_

To,

AXIS Securities Limited  
Unit No. 2, Phoenix Market City,  
15, LBS Road, Near Kamani Junction,  
Kurla (west), Mumbai-400070.

Dear Sir / Madam,

Re: Transfer-in request for Mutual Fund Folios of \_\_\_\_\_ Name of the AMC

Ref: AxisDirect Account No.:

I/ would like to transfer the unit holdings of all schemes held under my existing MF folio with \_\_\_\_\_ Name of the AMC to my online account maintained with AxisDirect (Online ARN code - 64610).

My existing details are given blow:

AMC Name:					
Serial No.	1	2	3	4	5
Folio Nos.					

Please change my bank mandate as per the details mentioned below for my subsequent transactions through AxisDirect for these folios.

(To be submitted only if the current bank account number in these folios is different than your linked bank account in AxisDirect)

Bank Name	
Branch Name	
Bank City	
Account No./ Type	
IFSC Code	
MICR Code	

	Primary Holder	Joint Holder 1	Joint Holder 2
Name			
Signature			

(To be signed by all applicants if mode of holding is 'Joint')

## Transfer-in application Form

To avail this facility of Transfer In (TI), it is mandatory to attach the below mentioned documents along with duly signed

**TI application:**

1. Proof of Existing bank account mentioned in the folio statement (Anyone of the three : (i) Copy of Bank Account Statement/Bank Passbook (ii) Letter from the banker (iii) Cancelled Cheque Leaf) This is as per the AMC guidelines.
2. Proof of New bank account that will be linked to the Folio after transfer in (Anyone of the 2 : (I) Cancelled Cheque Leaf (ii) Letter from the banker mentioning the Account number, Bank Name, Branch Name & address, IFSC Code and MICR Code.)
3. Latest Folio statement (last three months).
4. Self-attested Copy of PAN Card of all the holders

**Note:**

1. For Transfer-in of your existing Systematic Investment Plan (SIP) to your online account with Axis Direct, please cancel the existing off-line SIP and then create a Fresh SIP through [www.axisdirect.in](http://www.axisdirect.in)
2. For Transferring the investments held in joint mode, the joint holder/s shall be required to open a 3-in-1 account with AxisDirect.

Office Use only	
AXISDIRECT Account No. : _____	Date: DD/MM/YYYY
Client Name : _____	
Form No : _____	
Pan No : _____	
Employee Name : _____	