

Transfer-in application Form

(Applicable for folios purchased through Mutual Fund Distribution only)

DATE ____/____/ 20____

To,
 Mutual Funds Operations Team
 AXIS Securities Limited, Unit No. 2,
 Phoenix Market City, 15, LBS Road, Near Kamani Junction,
 Kurla (west), Mumbai-400070.
 Email : helpdesk@axisdirect.in ; Ph.no: [022-40508080](tel:022-40508080) ; [022-61480808](tel:022-61480808)

Dear Sir / Madam,

Ref: Axis Direct Account Number: _____

I/ would like to transfer the Mutual Fund unit holdings of below schemes held under my existing MF folio with online account maintained in Axis Direct (Online ARN code – 64610/ASWEBON).

My existing details are given below:

AMC Name:					
Folio Numbers:	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>

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

Change of Bank Mandate :			
Old Bank Details		New Bank Details	
Name of the Bank		Name of the Bank	
Bank Account number		Bank Account number	
Bank Account Type		Bank Account Type	
IFSC Code		IFSC Code	
Bank Branch		Bank Branch	
MICR 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')

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

TI application:

1. Latest Folio statement (last three months).
2. Proof of Old and New Bank account/s that is registered in the folios and Trading account:
 - (i) Original or banker attested copy of Letter from the banker mentioning the Account number, Holder's name, Bank Name, Branch Name, IFSC Code, MICR Code & Account Type duly signed by branch manager/authorized personnel with name, employee code & bank seal (IPV).
 - (ii) Original or banker attested copy of Bank Passbook or Bank Account Statement (not older than 3 months) with Account number, Account Type & Holder's name printed on it & duly signed by branch manager/authorized personnel with name, employee code & bank seal (IPV).
 - (iii) Original or banker attested copy of Canceled Cheque Leaf with holder's name & Account Type (SB/SBNRO/SBNRE) printed on it.
 - (iv) If above proof is not available for old bank account due to account closure then closure letter from bank signed by branch manager/authorized personnel with name, employee code & bank seal (IPV) can be submitted.
3. 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
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 : _____	