

**SWITCH CUM ADDITIONAL PURCHASE FORM**

Date 

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Client Code: \_\_\_\_\_ Client name: \_\_\_\_\_ Broker name: \_\_\_\_\_

Distributor RM Name/.code: \_\_\_\_\_ LICMFPMS RM Name/.code: \_\_\_\_\_

(Please (✓) as applicable)

**(A) Additional investment in existing portfolio:** Existing Scheme Name \_\_\_\_\_

Amount/Stocks: ₹ \_\_\_\_\_ Cheque/RTGS Ref No.: \_\_\_\_\_ Dated: \_\_\_\_\_

Bank Name: \_\_\_\_\_ Bank Branch: \_\_\_\_\_

**\*(B) Additional investment in new portfolio:** New Scheme Name \_\_\_\_\_

Amount/Stocks: ₹ \_\_\_\_\_ Cheque/RTGS Ref No.: \_\_\_\_\_ Dated: \_\_\_\_\_

Bank Name: \_\_\_\_\_ Bank Branch: \_\_\_\_\_

**\*(C) Alter existing investment strategy by moving assets to another portfolio (Switch In Switch Out)**

Partially transfer funds and / or securities amounting to ₹ \_\_\_\_\_ to PMS client code \_\_\_\_\_ scheme \_\_\_\_\_

Fully transfer funds and / or securities amounting to ₹ \_\_\_\_\_ to PMS client code \_\_\_\_\_ scheme \_\_\_\_\_

**INSTRUCTIONS:**

- Additional Investment in existing portfolio to be made in multiples of ₹ 5 lacs
- Additional investment in existing portfolio to be made such that aggregate investment in the portfolio meets minimum threshold limit of ₹ 50 lacs
- Minimum amount for additional investment in new portfolio is ₹ 25 Lacs
- \*For requests pertaining to point B and/or C, please submit duly signed new fee structure and Term Sheet.
- For investments through stock transfer case, please submit:
  - ☛ Soft copy of list of securities and quantity with correct ISINs
  - ☛ CML (Client Master List) of demat account from which securities are transferred.
  - ☛ Scanned copy of Inter Depository Transfer instruction submitted by client.
- In case of joint holders, all the holders are required to sign as per the mode of operations. In case of non individual, the authorized person is required to sign along with the stamp of the entity.

**Declaration and Signature (s)**

I/ We have fully understood the above request would be executed on a best effort basis and at the prevailing market price.

I/We have fully understood the Risk Profile for the investment in the New Portfolio and the decision to invest is basis my/our own professional skills and my/our own assessment of the risks involved.

I/We also understand that all my Holding Interests in the corporate bodies communicated at the time of initial investment will continue for Additional /Switch investment in the existing/new portfolio.

	First Applicant	Second Applicant	Third Applicant
Signature/ASL Stamp			
Applicant Name			

**Witness 1**

**Witness 2**

**Signature**

**Name**