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### **INSTRUCTIONS**

- 1. The Application Form should be completed in ENGLISH and in BLOCK LETTERS only.
- 2. Any over-writing / changes made while filling the form must be authenticated by canceling the original entry, reentering correct details and ensuring that all applicants counter-sign against each correction.
- Application forms along with supporting documents can be submitted to ISCs / OPAs, contact details of which are available on www.axismf.com.
- 4. Investors must write the application form number / folio number on the reverse of the cheque / demand draft.
- 5. Investors subscribing under Direct Plan of the scheme will have to indicate "Direct Plan" against the scheme name in the application form e.g. "Axis Equity Fund - Direct Plan". Investors should also indicate "Direct" in the ARN column of the application form. However, in case Distributor code is mentioned in the application form, but "Direct Plan" is indicated against the scheme name, the application will be processed under Direct Plan. Further, where application is received for Existing Plan without Distributor code or "Direct" mentioned in the ARN Column, the application will be processed under Direct Plan.
- 6. Investor investing through distributor shall mention EUIN on the application form, if he/she has been advised by Sales Person/ Employee/ Relationship Manager of the distributor this would assist in addressing any instance of mis-selling. If left blank, applicant(s) need to tick and sign the following declaration "I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker." on the form. SEBI has made it mandatory to obtain EUIN no. for every employee/ relationship manager/sales person of the distributor for selling mutual fund products.
- Multiple SIP registration facility is not available for Axis Children's Gift Fund, Axis Liquid Fund, Gold ETF and during NFO.
- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 21 days before the first SIP Installment date.
- Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st.
- If SIP date is not mentioned, default date would be considered as 7th of every month. If the SIP date falls on a nonbusiness day or a bank holiday, the SIP debit will be processed on the following business day.

#### 11. Please refer below table for minimum amount per installments:

5	Scheme	Minimum Amount (₹)	Minimum Installments
ļ	All Schemes except Axis Liquid Fund	1000	12
A	Axis Long Term Equity Fund*	500	6

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of ₹ 1. For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of ₹ 500\*.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹ 1,000/-.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing.
- 14. The SIP will be discontinued automatically if payment is not received for three successive installments.
- 15. Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- 16. Mandate will be processed through NACH platform offered by NPCI.
- 17. As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following:
  - For Existing / New investors: ₹ 100 / ₹ 150 as applicable per subscription of ₹ 10,000/- and above.
  - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to
    ₹ 10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful
    installments.
  - There shall be no transaction charge on subscription below ₹ 10,000/-.
  - There shall be no transaction charges on direct investments.

- There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.
- Transactions carried out through the Stock Exchange platforms for mutual funds shall not be subject to transaction charges.

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

However, the option to charge "transaction charges" is at the discretion of the distributors.

Investors may note that distributors can opt to receive transaction charges based on type of the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable.

- 18. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
- 19. In case an investor wishes to change the bank account details for the existing SIP registered through NACH Debit mode, then he/she has to provide a cancellation for the existing SIP Mandate and register fresh SIP with the new bank details.
- 20. Existing unit holders should note that unit holders' details and mode of holding (single, jointly, anyone or survivor) will be as per the existing Account
- 21. Axis Mutual Fund reserves the right to reject any application without assigning any reason thereof. Axis Mutual Fund in consultation with Trustees reserves the right to withdraw these offerings, modify the procedure, frequency, dates, load structure in accordance with the SEBI Regulations and any such change will be applicable only to units transacted pursuant to such change on a prospective basis.
- 22. TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details.
  - The minimum amount for Axis TOP-UP facility is ₹ 500/- and in multiples of ₹ 1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹ 500 and in multiples of 500 thereafter.
  - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP
    amount would be considered, i.e., ₹ 500/- for all schemes.
  - TOP-UP frequencies available are Half-Yearly/ Yearly/ Dynamic requested intervals.
  - In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
  - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
  - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6
    months from the date of the first installment and minimum gap between two top up requests should be 3
    months and amount specified in last request shall be continued till the End of the SIP tenure.
  - Please see the illustration below to know how to calculate SIP Top-Up amount:
    - SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹ 1000
    - Top-Up amount is ₹ 500 · Top-Up Frequency is Half-yearly

Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000

### **ONE TIME MANDATE (OTM) FORM**

ARN-64917

E434563

Name of Applicant																			
PAN No.						N	lobile	e No.											
Email ID																			
Bank Name																			
Account No.																			

I/We declare that the particulars furnished here are correct. I/We authorize Axis Mutual Fund acting through its service providers to debit my/our bank account towards payment of SIP installments and/or any lumpsum payments through an Electronic Debit arrangement / NACH (National Automated Clearing House) as per my request from time to time.

If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We would not hold the user institution responsible.

I/We will also inform Axis Mutual Fund about any changes in my bank account.

I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form.

Further, I authorize my representative (the bearer of this request) to get the above Mandate verified. Mandate verification charges, if any, may be charged to my/our account.

I/We hereby agree to read the respective SID and SAI of the mutual fund before investing in any scheme of Axis Mutual Fund using this facility.

I/ We request you to make provisions for me/ us and/ or an advisor authorized by me to be able to utilize this mandate for any transaction (not limited to SIP and/ or Lumpsum payments) in all the folios associated with my PAN mentioned above any mode of transaction available to me time to time from Axis Mutual Fund.

I give my consent to Axis Asset Management Company Limited and its agents to contact me over phone, SMS, email or any other mode to address my investment related queries and/or receive communication pertaining to transactions/ non-commercial transactions/ promotional/ potential investments and other communication/ material irrespective of my blocking preferences with the Customer Preference Registration Facility.

	Signature of First Account Holder				nature of Account Holder			Т	hird Holder	
Dated D	D M M Y Y Y Y	Place								
AXIS MUTUAL FUND	UMRN			Bank us	e			Date	e D D M M	
Tick (√)	Sponsor Bank Code				Utility Code					
CREATE 🖌	I/We hereby authorize	Axis I	Nutual Fund		to debit (tick $\checkmark$	) 🗌 SB 🗌 C	A 🗌 CC	SB-NRE	SB-NRO	Other
MODIFY X CANCEL X	Bank a/c number									
with Bank	Name of customers ba	nk		IFSC				or MICR		
an amount of F	Rupees							₹		
FREQUENCY	X Mthly X Qtly X H-	Yrly 🛛 X	ly 🖌 As&w	/hen prese	ented	DEBIT T	YPE X	Fixed Amoun	nt 🗸 Maximun	n Amount
Reference 1	F	olio No.			Phone No.					
Reference 2	All Schemes	of Axis Mutua	al Fund		Email ID					
l agree for the debi	t of mandate processing charges by the banl	whom I am auth	norizing to debit my ac	counts as pe	latest schedule of ch	arges of the bank.				
From	D         M         M         Y         Y         Y         Y									
То	D D M M Y Y Y Y	Sig	nature Primary A	ccount hol	der S	ignature of Acco	ount holder		Signature of Ac	ccount holder
Or	Until Cancelled	1	Name as in ban	k records	2	Name as in ban	k records	3	Name as in ba	ank records
I have understood t	hat the declaration (as mentioned overleaf) h that I am authorized to cancel / amend this m	andate by appro	oriately communicatin	g the cancella	ition / amendment req	uest to the User entit	ty / Corporate o	or the bank where	I have authorized the d	

WANDATORY FIELDS: • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date or until cancelled • Account holder signature • Account holder name as per bank records

### ACKNOWLEDGMENT SLIP (To be filled by the investor)

Investor Name	Stamp & Signature
PAN No.	Stamp & Signature



# SIP NACH REGISTRATION FORM

Investor need to submitted this form along with SIP Registration Form.

Distributo	r	Sub-Distributor	Internal Sub-Broker/
ARN	ARN-64917	ARN	Sol ID
EUIN	E434563	Employee Code	RIA CODE^

PMR (Portfolio Manager's Registration) Number ^ ^

Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. ^//We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. ^ I/We, have invested in the scheme(s) of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. ^ I/We, have invested in the scheme(s) of Axis Mutual Fund, to the above mentioned SEBI Registered Portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of Axis Mutual Fund, to the above mentioned SEBI Registered Portfolio Manager.

"I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/ relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker."

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
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TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Instruction No. 10)

I confirm that I am a first time investor across Mutual Funds.

OR

I confirm that I am an existing investor across Mutual Funds.

In case the subscription amount is ₹ 10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/subscription amount and payable to the Distributor. Units will be issued against the balance amount invested.

YOUR INFORMA	тю	N (/	۸AN	DAT	ORY	)	(If y	E) ou hav	(ISTI /e an e	NG xisting	INVI folio w	ESTC ith KYC	R'S valida	FOL ated, pl	IO N ease m	<b>UMI</b> ention	BER here)	Foli	o nur	nber											
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Name of the Gua	rdia	n	Mr.	Ms.	M/s.		(ln c	ase F	irst /	Sole	Applic	ant is	min	or) / (	lonta	ct Per	son -	Desi	Inatio	n / P	bA H	OLDE	R (In	case	of No	n-ind	dividu	il Inv	estors	)	
Your PAN											2nc	l Hol	der	PAN											]						
3rd Holder PAN																															

### NACH MANDATE SHOULD BE ACCOMPANIED WITH SIP REGISTRATION FORM

	UMRN			Bank us	e				Date	D D I	M M Y Y Y	··>≮-   γ
Tick (√)	Sponsor Bank Code		Bank use		Utility C	ode			Bank us	е		
CREATE 🖌	I/We hereby authorize		Axis Mutual Fund		to debit (t	.ck√ ) [[	SB CA		SB-NRE	SB-NRO	Other	
MODIFY X CANCEL X	Bank a/c number											
with Bank	Name of custome	ers bank		IFSC					or MICR			
an amount of	Rupees		In	Words					₹		In Figures	
FREQUENCY	X Mthly X Qtly X	H-Yrly	🗙 Yrly 🖌 As & w	/hen prese	ented		DEBIT TYP	EX	Fixed Amount	🖌 Max	kimum Amount	
Reference 1		PAN No	-		Phone No.							
Reference 2	All Sche	mes of Axis	Mutual Fund		Email ID							
l agree for the deb	it of mandate processing charges by th	e bank whom I	am authorizing to debit my ac	ccounts as pe	latest schedul	e of charges	s of the bank.					
	PERIOD											
From	D D M M Y Y	Y										
То	D D M M Y Y	Υ	Signature Primary A	ccount ho	der	Signa	ature of Accour	ıt holder		Signature	of Account holder	
Or	Until Cancelled	1.			2				3			
			Name as in ban	k records		Nar	me as in bank r	ecords		Name as	s in bank records	
This is to confirm to have understood	that the declaration (as mentioned over that I am authorized to cancel / amend	leaf) has been ( this mandate b	carefully read, understood & r y appropriately communicatin	made by me / g the cancella	us. I am authori ition / amendme	zing the Use nt request 1	er Entity / Corporat to the User entity /	e to debit n Corporate	ny account, based o or the bank where l	n the instruction have authorized	ons as agreed and signed ed the debit. ·····>€···	,
MANDATORY FIE	LDS : • Instrument Date • Account typ	e • Bank A/c nu	mber (core banking a/c no only	) • Bank nam								l date or

## SYSTEMATIC TRANSFER PLAN (STP)

- - -

Amount



Stamp & Signature

THE APPLICATION FORM SHOULD BE FILLED IN BLOCK LETTERS (	DNLY.
Distributor ARN Sub-Distributor ARN Internal Sub-Broker / Sol ID	
ARN 64917 ARN Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the inve	E 434563
^ I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our co under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Ad	sent to share/provide the transactions data feed/ portfolio holdings/ NAV etc. in respect of my/our investments
"//We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-oppropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker."	''''''''''''''''''''''''''''''''''''''
employee/relationship manager/sales person of the distributor/sub broker."	ian Coorta Applean Contractory Porton
	onfirm that I am an existing investor in Mutual Funds.
In case the subscription (lumpsum) amount is ` 10,000/- or more and your Distributor has a investor other than first time mutual fund investor) will be deducted from the subscription amo	pted to receive Transaction Charges, ₹ 150/- (for first time mutual fund investor) or ` 100/- (for unt and paid to the distributor. Units will be issued against the balance amount invested.
1 Applicant Details	Folio No.
Sole / 1st Unitholder (as in PAN Card / KYC records)	
Guardian's Name	Middle Name Last Name
1st Holder 2nd Holder PAN 2nd Holder	2nd Applicant 3rd Holder 3rd Applicant
2 SYSTEMATIC TRANSFER PLAN (STP) (To be submitted at least 7 v	vorking days before the 1st due date for transfer).
From Scheme <sup>#</sup>	
Option (tick ü) 🗌 Growth 🛛 Dividend Reinvestment 🗌 Dividend Payout	Bonus Dividend Frequency
Plan 🗌 Direct 🗌 Regular	
To Scheme	
Option (tick ü) Growth Dividend Reinvestment Dividend Payout	Dividend Frequency
Plan 🗌 Direct 🗌 Regular	
(Please tick ü any one) Ref. Instruction 5	
Systematic Transfer Plan (STP) (Ref. Instruction 5)	Capital Appreciation Systematic Transfer Plan (CapSTP) (Ref Instruction 6)
Transfer Frequency (Please tick (ü) any one of the below frequencies)	Transfer Frequency (Please tick (ü) any one of the below frequencies)
Daily     Weekly*     (Monday To Friday) Day of transfer	Weekly (Monday To Friday) * Day of transfer
Veekiy     (verted) to margin but ready     Day of margin but ready     Day of margin but ready     The ready     The ready ready	☐ Monthly \$         (Please tick (✓) any one)           ☐ Quarterly \$         ☐ 1st         ☐ 7th         ☐ 10th         ☐ 15th         25th
□ Monthly \$ □ 1st □ 7th □ 10th □ 15th □ 25th	
Transfer Instalment ₹	
No. of Instalments OR Transfer Period From	D     M     M     Y     Y       (First Instalment)     (Last Instalment)
*Ref. Instruction 11. \$ Ref Instruction 12.	Image: Constraint of the state of the s
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Frequency

# SYSTEMATIC WITHDRAWAL PLAN (SWP)



THE APPLICATION FOR							1.5			- ·							-	-			5	0.7		<b>.</b>	
Distributor ARN									Employ	E 434563					(CO	DE^	S	erial No., Date & Time Stamp							
ARN 64917	Paid directly by the in	vestor to the A	AMFLreg	istered d	listributor	based or	1 the in	vesto	or's assess	mentofva					service	rende	ered hv	the d	istrihi	utor.					
· I/We, have invested in the inder Direct Plan of all schen "I/We hereby confirm the	scheme(s) of Axis Mu nes of Axis Mutual Fur t the EUIN box has be	tual Fund und nd, to the abo een intention	der Direc ve mentio allv left b	t Plan. I, oned SEl lank by	/We herel BI Registe me/us as	by give m red Inves	tment A	conse Advis	ent to sho er:	re/provide	e the tro	ansactio	ons d	ata fe		folio h	olding	gs/ NA	V etc.	. in res					
notwithstanding the advice of in-oppropriateness, if any, provided by the Guardian employee/relationship manager/sales person of the distributor/sub broker."															Applicant Power of Attorney Holder										
TRANSACTION CH I confirm that I ar In case the subscription ( investor other than first ti	n <mark>a first time inv</mark> lumpsum) amoun	vestor acro t is ₹ 10,00	oss Mu 0/- or n	<b>itual F</b> nore ai	unds. nd your	<b>OR</b> Distribu	tor ha	l c	onfirm	that I a eceive Tro	<mark>m an</mark> ansact	exist	<mark>ing</mark> harg	inves es, ₹	150/-	for fi	rst tim	ne mu	utual	fund ice an	inves	tor) o inves	r₹1( ted.	00/-	(fc
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3 DECLARATIO	N AND SIGN	ATURES																							
taving read and understoo We hereby declare that the provisions of the Income by any rebate or gifts, direct distraction of the Mutual F, indertake such other action indertake such other action ichemes of various Mutual F vill result in aggregate inves nat //We have remitted func rue and correct.	amount invested in t Tax Act, Anti Money L y or indirectly in maki und, (I/we hereby aui with such funds that unds amongst which tments exceeding ₹ 5	he scheme is t aundering La ing this invest thorize the M may be requi the Scheme is 0,000 in a ye	through I aws, Anti ment. I/V utual Fur red by the s being re ar (Appli	legitimat Corrupt Ne confi nd, to re e law.) T ecomme cable fo	te source tion Laws rm that the deem the he ARN h ended to r r Micro in	only and or any of the funds in funds in tolder has me/ us. l/ typestment	does n her app nvested vested s disclo We cor only.) v	ot inv plica in th in th sed t ofirm with y	volve desi ble laws e ne Schem o me/us that I/We vour fund	gned for th nacted by e, legally b e, in favou all the com do not hav house. For	the purp the Go elongs or of th missio ve any r NRIs o	oose of t overnme to me/ e applie ns (trail existing only - 1/	the co out o cant, cant, cant, com Mico We o	f India even at the missic o SIP/ confirm	ention o from tir "Know applice n or an Lumpsu	f any A ne to t Your C ble N v other m inve m/ we	Act, Rul ime. I/ Custom AV pre mode estmen are N	les, Re we ho ner" p evailin e), pay nts whi lon Re	egulat roces ig on able ich tog	tions, N treceives is not the da to him gether ts of In	Notifice ived no t comp te of s for the with th udian n	ations or have leted l such re e differ ne curr natione	or Dire been by me, edemp rent co ent ap ality/o	ective indu/ us to otion o ompet oplicat rigin o	s of the and ing ion
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*INSTRUCTION 1. Please refer the Ke Factors, Load Struc 2. Contingent Deferre 3. The AMC reservest 4. You can choose to withdrawn from the 5. The Default bank of available at www.a 6. Incorrect, incomple	y Information Mer ture and other info ed Sales Charge (C he right to accept s discontinue any of e account or the ho account or the ho account as mentio xismf.com. ete, ambagious for	morandum ormation or CDSC)/Exit I SWP applica f these facili oldings fall k ned in the c rms will be r	the Sch Load if c ations o ities by g below th above fo ejected	neme(s) any is a of difference giving ne SWP plio wo	). pplicabl ent amo 15 days amount uld be c	e to SWI unts, da prior no consider	P. Ites an otice ir ed for	nd fre n wri r suc	equency iting to c h credite	our Regist . Incase	trar Ko you w	arvy ar vish to	nd it chai	will te nge th	ermina ne banl	te aut	tomat ount f	tically	∕ifal a Ch	l the l	Units	are lia	quido	ited,	or
7. If SWP date and fre ≪	quency is not ment	tioned by in	vestor, c	detault	date & fi	requenc	y wou	id b	e consid	ered as 1	Uth o	t every	, mo	nth ar	nd mon	thly r	espec	tively	/.						>
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Amount

Frequency

Stamp & Signature