



Form for Individual Applicants

Annexure to Investment Application Form

Applicant/ Guardian / Power of Attorney Holder Name: _____

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SECTION I

Gross Annual Income Details	Please Tick
Below Rs. 1 Lac	
Rs. 1 Lac – Rs. 5 Lacs	
Rs. 5 Lacs – 10 Lacs	
Rs. 10 Lacs – 25 Lacs	
Rs. 25 Lacs – 1 Crore	
Rs. 1 Crore – 5 Crores	
Rs. 5cr- 10cr	
Rs. 10 cr or	

OR

Net-worth as on (date) : ___ / ___ / ___

Rs. _____

(should not be older than 1 year)

SECTION I

Occupation	Please Tick
Private Sector	
Public Sector	
Government Service	
Business	
Professional	
Agriculturist	
Retired	
Housewife	
Student	
Others (<i>Please Specify</i>)	

SECTION I

Please tick, if applicable,

- Politically Exposed Person (PEP)**
- Related to a Politically Exposed Person (PEP)**

I declare that the information is to the best of my knowledge and belief, accurate and complete. I agree to notify Kotak Mahindra Mutual Fund immediately, in the event of any change in the afore-said information.

Signature : _____

Date : _____

Instructions:

- This form needs to be submitted by each & every applicant (including Guardian and Power of Attorney Holder) separately, for first time investment in Kotak Mahindra Mutual Fund.
- Investment shall be liable to be rejected on account of incomplete information on this form/ non-submission of this form.
- Politically Exposed Persons (PEP): PEPs are defined as individuals who are or have been entrusted with prominent public functions in a foreign country, e.g., Heads of States or of Governments, senior politicians, senior Government/ judicial/ military officers, senior executives of state owned corporations, important political party officials, etc. or senior political figures and their immediate family members and close associates.