APPLICATION FORM FOR SYSTEMATIC WITHDRAWAL PLAN (SWP)

(For Existing Unit Holders only)

Please read the instructions overleaf carefully and complete the relevant sections legibly in black / dark coloured ink and in BLOCK LETTERS.
Please strike off unused section(s) to avoid unauthorised use

○ **New Registration** ○ **Cancellation**

Date D D M M Y Y Y Y

1. EXISTING UNITHOLDER(S) INFORMATION*

Existing Folio No.		***Mandatory**	**Permanent Account Number (PAN)**

Name of the Unit Holder [Please Tick (✓)]

○ Mr. ○ Ms. ○ M/s.

Email Id

2. SYSTEMATIC WITHDRAWAL PLAN ("SWP") DETAILS* (Refer Section 'A' of instructions) [Please Tick (✓)]

Scheme	U N I O N
Plan	○ Direct Plan ○ Regular Plan/ Other than Direct Plan
Option	○ Growth ○ Payout of IDCW ○ Transfer of IDCW ○ Reinvestment of IDCW (IDCW - Income Distribution cum Capital Widrawal)
Withdrawal Amount in ₹ (Figures)	Withdrawal Amount in ₹ (words)
Withdrawal Frequency	○ Daily ○ Monthly (Default) ○ Quarterly ○ Half yearly ○ Yearly
Withdrawal Period	From D D M M Y Y Y Y **To** D D M M Y Y Y Y **OR** ○ Till Further Instruction# (Default)
SWP Date$	D D $If day or date chosen for SWP falls on a Non-Business Day, the SWP will be processed on the immediate next Business Day.

If the SWP end date is not selected by the investor, then the SWP will continue till further instructions are received from the investor or till all units are liquidated or withdrawn from the account or pledged or upon the notification of death of the Unit holder is received by the AMC.

3. PAYMENT OF SWP PROCEEDS

Redemption proceeds through SWP will be credited to the default bank account registered in the Folio. If you wish to receive the redemption proceeds into any other bank account registered in the Folio, please mention the Bank Account No. and Name below:

Account No.	
Bank Name & Branch	

(If the above mentioned bank details do not match with the registered bank account in your Folio, proceeds will be credited to the default bank account registered in the Folio.)

4. DECLARATION & SIGNATURES* (Refer Section 'B' of instructions)

I/We have read and understood the contents of the Scheme Information Document and Statement of Additional Information, Key Information Memorandum, Instructions and addenda issued by Union Mutual Fund, I / We, hereby apply to the Trustee of Union Mutual Fund for Systematic Withdrawal Plan ("SWP") under the relevant Scheme and agree to abide by the terms and conditions, rules and regulations of the Scheme. I / We hereby agree that any transaction processed under the Systematic Withdrawal Plan will be binding upon me/us. I /We will not hold the AMC/the Trustee Company/ the Mutual Fund / the Sponsor liable for any transaction processed under the SWP. I / We have neither received nor been induced by any rebate or gifts, directly or indirectly in opting for this facility. I / We declare that the amount invested in the Scheme is through legitimate sources only and is not designed for the purpose of contravention or evasion of any Act, Regulation, Rule, Notification, Directions or any other applicable laws enacted by the Government of India or any Statutory Authority. I/ We hereby confirm that Union Mutual Fund/ Union Asset Management Company Private Limited and its empanelled broker(s) has not given any indicative portfolio and indicative yield, in any manner whatsoever. I / We have the express authority to transact in units of the Scheme and the AMC/ Trustee / Mutual Fund/ Sponsor will not be responsible if such transaction is ultravires the relevant constitution.

Signature	Signature	Signature
Sole / First Applicant / Guardian / POA / Authorised Signatory	Second Applicant / POA / Authorised Signatory	Third Applicant / POA / Authorised Signatory

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ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Ref. No.

Folio No.

Received from: Mr./ Ms./ M/s _____ Date: / /

Application for Systematic Withdrawal Plan

Scheme/ Plan/ Option - _____

SWP Period	From	D	D	M	M	Y	Y	Y	Y	**To**	D	D	M	M	Y	Y	Y	Y	**OR**	○ Till Further Instruction (Default)
Amount in ₹																				

Collection centre's stamp with date and time of receipt