

Old Bridge Asset Management Private Limited

Registered Office: 1705, One BKC, C wing, G Block, Bandra Kurla Complex, Bandra (East), Mumbai - 400051.

## MODIFY SIP

Distributor / Broker ARN ARN -	Sub-Broker ARN Code ARN -	Internal Sub-Broker/Employee Code	Employee Unique Identification No. (EUIIN) (Of Individual ARN holder or Of employee / Relationship Manager / Sales Person of the Distributor)	Registered Investment Advisor Code
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For details on transaction charges payable to distributors, please refer to KIM.

I/We hereby confirm that the EUIIN 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.

1 <sup>st</sup> Holder	2 <sup>nd</sup> Holder	3 <sup>rd</sup> Holder
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Folio Number

Sole / First Holder Name

Existing UMRN  SIP Reference No.

### SIP Details

Existing Frequency (✓)  Monthly (Default)  Quarterly (Jan, April, July, Oct) Existing SIP Start Date  to End Date

New Frequency (✓)  Monthly (Default)  Quarterly (Jan, April, July, Oct) New SIP Start Date  to End Date

Registered SIP Installment Amount  Modify SIP Installment Amount

Registered Scheme Name

Modify Scheme Name

<input type="text"/>	<input type="text"/>	<input type="text"/>
Sole / 1 <sup>st</sup> Holder	2 <sup>nd</sup> Holder	3 <sup>rd</sup> Holder

### Terms and Conditions

1. Under this facility, the investor can modify the scheme / plan / option, frequency, amount and date under the existing SIP registration. The facility to modify the amount will be available only to those investors who have registered maximum amount for debit. However, once the investor has availed modification facility then the maximum amount for debit mandate cannot be reduced. In case, SIP installment after modification exceeds the maximum amount for debit, then the request to modify SIP instalment amount will be rejected. 2. Modification form should be submitted at least 30 days prior to the next SIP installment date. 3. In case investor has opted for modification in SIP installment amount and Top-Up facility is already registered under the said SIP, then the Top-Up amount would be added to the modified SIP amount. 4. Investor must mention the SIP Registration Number (SRN) as stated in account statement for modifying the SIP details. In case an investor does not mention the SRN and has more than one live SIP in a single folio in the same scheme with same SIP date / amount then the first registered SIP would be modified. 5. In case there is modification of scheme, then the load structure in new scheme prevailing at the time of registration of Modify facility mandate will be applicable. However, in case of request for modification of plan / option of the scheme, frequency, amount and date of SIP installment, the load structure prevailing at the time of registration of SIP will continue to be applicable. 6. Modify SIP facility will not be available to investors registered under SIP through Post Dated Cheques/ Channel Partners/ Stock Exchange Platforms.

## PAUSE SIP

Folio Number

Sole / First Holder Name

Existing UMRN  SIP Reference No.

### Existing SIP Details

Frequency (✓)  Monthly (Default)  Quarterly (Jan, April, July, Oct) SIP Date  SIP Installment Amount

Scheme

Pause Start Date  Number of Installments to be stopped

<input type="text"/>	<input type="text"/>	<input type="text"/>
Sole / 1 <sup>st</sup> Holder	2 <sup>nd</sup> Holder	3 <sup>rd</sup> Holder

### Terms and Conditions

1. Under this Facility, investor has an option to temporarily pause their registered Monthly SIP facility for a period of six (6) months by submitting prescribed application form at any of the Official Points of Acceptance of Old Bridge Mutual Fund or by submitting application in other modes made available by AMC. 2. The SIP Pause facility can be availed by investor only two times during the entire tenure of SIP. 3. The valid application to avail the Facility should be submitted to AMC at least 10 calendar days prior to the next Monthly SIP instalment date (i.e. excluding the request date and the next SIP instalment date). Investor cannot cancel the SIP Pause facility once requested. 4. The SIP Pause facility is only available under Monthly frequency. SIP pause facility is available only for investors with instalment amounts equal to or greater than SIP's greater than Rs. 1,000/-SIP Pause facility can only be availed by investors who has completed 6 valid SIP installments. 5. The SIP shall restart automatically from the immediate next eligible instalment after the completion of specified pause period. 6. This facility is not available for the SIPs sourced/registered through MF Utilities India Pvt. Ltd. ("MFUI"), Stock Exchange Platforms of NSE & BSE and Channel partner platforms, as for such SIPs, the SIP mandates are registered by respective entities or for SIPs which are registered by investors as Standing Instructions with their Banks. 7. For Top-up SIP facility, the top-up frequency would remain unchanged even if there is a pause in SIP instalment. SIP tenure end date will not be extended and subsequent STP / SWP will be rejected if there is no unit balance in the said scheme. 8. In case of multiple SIPs registered in a scheme, SIP Pause facility will be made applicable only for those SIP installments whose SIP date, frequency, amount and Plan is specified clearly in the form. 9. AMC/Fund reserves the right to amend the terms and conditions of the SIP Pause facility and/or withdraw the said facility.