



Photograph

JM FINANCIAL MUTUAL FUND
Application for Agency
(Only AMFI Certification Test Cleared Eligible)

Branch Address Stamp

Code Allotted

Validity of ARN: \_\_\_ / \_\_\_ / \_\_\_

NAME (Block Letters) : \_\_\_\_\_

AMFI REGD. NO. : | A | R | N | - | | | | | | | | | | | | | | | |

STATUS (Please ✓) :  Resident  Non - Resident

EDUCATION (for Individual) : \_\_\_\_\_ Age \_\_\_\_\_ Years \_\_\_\_\_

PAN DETAILS : | | | | | | | | | | | | | | | | (Please mention your Pan number)

CATEGORY :  Individual  Sole Proprietary  Public Ltd  Private Limited  Partnership

ADDRESS (Block Letters) : \_\_\_\_\_

\_\_\_\_\_ Pin Code \_\_\_\_\_

TEL NO. (Office) : \_\_\_\_\_ Residence \_\_\_\_\_ Mobile No \_\_\_\_\_

FAX NO : \_\_\_\_\_

EMAIL ID : \_\_\_\_\_

CURRENT OCCUPATION (Please ✓)  Financial Services  Business  Service  Professional

Housewife  Retired

EXPERIENCE IN MARKETING  Equity Shares  Fixed Deposits

FINANCIAL PRODUCTS (Please ✓)  Mutual Funds  Bonds  Insurance  Others

EMPANELLED WITH (Please ✓)  UTI MF  TEMPLETON MF  BIRLA MF  SBI MF

KOTAK MF  LIC MF  DSP MF  TATA MF  HDFC MF  PRINCIPAL MF

SUNDARAM MF  CANBANK MF  RELIANCE MF  OTHERS (PI specify)

Table with 2 columns: DETAILS OF MF SCHEMES / OTHER, AMOUNT MOBILISED. Rows: Equity, Debt, Liquid.

BANK PARTICULARS: (Mandatory)

Name of the Bank and Branch Address \_\_\_\_\_

Bank Account  Saving Account  Current Account IFSC Code: | | | | | | | | | | | | | | | |

BankAccountNo. | | | | | | | | | | | | | | | | | | | | | | MICR Code: | | | | | | | | | | | | | | | | | | | | |

DECLARATION

I/We hereby declare that the information furnished herein is true and correct to the best of my/our knowledge and belief. I/We undertake to abide by the terms and conditions which JM Financial Mutual Fund has at present or which may be formulated in future regarding operations of agents. I/We hereby declare that I am /We are not the employee of JM Financial Asset Management Ltd. I/We further indemnify the AMC / Mutual Fund for any direct / indirect or consequential loss caused due to any error / omission, fraud, negligence or misrepresentation by my/our actions or me/us.

Date: \_\_\_\_\_

Place: \_\_\_\_\_

\_\_\_\_\_  
Signature