

Name of the Third Applicant

Mr./Mrs./Ms./M/s.

Date of Birth

D D M M Y Y Y Y PAN*

OR PEKRN*

KYC compliant (Please ✓)
(Refer instruction no. 3(d))

Nationality

Gross Annual Income per annum (Please ✓) : Below 1 Lac Rs.1 - 5 Lac Rs.5 - 10 Lac Rs.10 - 25 Lac > 25 Lac

Net worth as on date Rs. (Net worth should not be older than 1 year)

Place of Birth

Country of Tax Residence

Tax ID Number^

Power of Attorney (PoA) Holder Details - Third Holder

Mr./Mrs./Ms.

PAN*

OR PEKRN*

KYC compliant (Please ✓) (Refer instruction no. 3(d))Gross Annual Income per annum (Please ✓) : Below 1 Lac Rs.1 - 5 Lac Rs.5 - 10 Lac Rs.10 - 25 Lac > 25 Lac

Net worth as on date Rs. (Net worth should not be older than 1 year)

Place of Birth

Country of Tax Residence

Tax ID Number^

Address Of First / Sole Applicant / Non-Individual Investor (Only P. O. Box Address is not sufficient)

City

State

Pincode

Overseas Address (Mandatory for NRIs /FII) (Principal place of business/operations required if different from mailing/correspondence address)**Contact details of First / Sole Applicant / Non-Individual investor** (Please mention the STD/ISD Codes)

Office Tel.:

Residence Tel.:

Fax

Mobile:

E-Mail:

I/We wish to receive the account statement/scheme wise annual report or an abridged summary thereof/statutory and other documents by physical mode in lieu of e-mail (Please ✓)
(Applicable if E-mail address is mentioned above) (Refer instruction 7).

*Please attach proof. PAN is not mandatory for certain Investors(Refer instruction no. 1 (b) (vi)). ^ Please attach proof for TAX ID Number. # Please submit the duly filled KYC Application Form and supporting documents for all Applicants / POA holders / Guardians (as applicable) who are not KYC compliant.

4. MODE OF OPERATION (Please ✓) (Refer instruction no. 4) Joint Single Anyone or Survivor

(Default : Anyone or Survivor)

5. STATUS (of First / Sole Applicant) (Please ✓) (Refer instruction no. 4)

- Individual (Indian Resident) Non-Resident Indian /Person of Indian Origin Minor Private Company Public Company Schemes of Mutual Fund
- Registered Financial Institution / Commercial Bank Foreign Institutional investor (FII) Partnership Firm Trust Society / Charity AOP BOI QFI
- Hindu Undivided Family Investment through Power of Attorney Other (Please Specify) _____

6. OCCUPATION (of First / Sole Applicant) (Please ✓) (Refer instruction no. 4)

- Professional Business Housewife Retired Student Public Sector/ Government Service Private Sector Service Agriculturist
- Forex Dealer Proprietorship Others (please specify)

Is any person associated with this account a current/former head of state, senior official in any government, senior executive of state-owned enterprise or senior politician in/outside of India; or an immediate family member or close advisor of such an individual; or is this account held by an organization controlled by such an individual? (Please ✓) Yes No**7. BANK ACCOUNT DETAILS** (Refer instruction no. 5)

(Investors opting to invest in demat form to ensure that bank account details linked with demat account are mentioned)

Name of the Bank

Branch

Bank City

Pincode

State

Account No.

11 Digit IFSC Code

(Mandatory for credit via NEFT/RTGS)

9 Digit MICR Code

Account Type (Please ✓) Savings Current NRE NRO FCNR Others (please specify)**8. INVESTMENT DETAILS** (Refer instruction no. 6)

Scheme:

(Please mention the scheme name you are investing in)

- Plan: Direct Plan Distributor Plan
- Option: Growth Dividend
- Dividend Option: Payout Reinvestment
- Default Option: Growth
- Default Dividend Option: Dividend Reinvestment

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