Investment Application Form

For individual applicants · Gromore Wealth Management Services Private Limited

DATE (DD/MM/YYYY) | **FOLIO NO.** (existing investors) | **APPLICATION NO.** | **ARN OF DISTRIBUTOR**

01 PRINCIPAL APPLICANT

NAME (AS PER PAN) | **MR / MRS / MS**

PAN | **DATE OF BIRTH** (DD/MM/YYYY) | **KYC STATUS** (KRA verified / pending)

MOBILE NO. | **EMAIL**

ADDRESS

CITY | **STATE** | **PIN CODE**

02 SECOND APPLICANT

if the folio is held jointly

NAME (AS PER PAN) | **PAN**

◯ Single ◯ Either or survivor ◯ Jointly

03 INVESTMENT DETAILS

SCHEME NAME	PLAN / OPTION	AMOUNT ₹

◯ Lumpsum ◯ Additional purchase in an existing folio

04 PAYMENT DETAILS

◯ Cheque / DD ◯ NEFT / RTGS ◯ UPI

PAYMENT DATE (DD/MM/YYYY) _____

CHEQUE / UTR / UPI REF. NO. _____

BANK NAME _____

BRANCH _____

BANK ACCOUNT NO. _____

IFSC _____

The account above must belong to the first applicant. Write your PAN and the scheme name on the reverse of the cheque.

05 RETURN FREQUENCY

◯ Quarterly ◯ Half-yearly

◯ Annually

06 NOMINATION

required — nominate or opt out

NOMINEE NAME _____

RELATIONSHIP _____

SHARE % _____

DATE OF BIRTH (DD/MM/YYYY) _____

GUARDIAN, IF NOMINEE IS A MINOR _____

☐ I/We do not wish to nominate, and accept the consequences of not doing so.

07 IDENTITY DOCUMENTS

required for KYC processing

☐ AADHAAR CARD FRONT *

☐ AADHAAR CARD BACK *

☐ PAN CARD *

☐ PHOTOGRAPH *

08 DECLARATION AND SIGNATURE

1. I/We confirm that all information provided is true and correct, and that I/we have read and understood the scheme documents and terms.
2. I/We confirm that the product features and risks were explained, the decision is my/our own, and I/we accept full responsibility for suitability.
3. I/We confirm that the funds invested are from my/our legitimate sources and not held on behalf of any other person.
4. I/We authorize the FMC and its registrar to share transaction details with the distributor for servicing purposes.
5. This application is not for Shares, Mutual Funds, Crypto, or digital assets, but is purely an unsecured loan against fixed interest (after applicable TDS).

SIGNATURE — APPLICANT

FOR OFFICE USE — AUTHORISED SIGNATORY

PLACE

DATE (DD/MM/YYYY)

09 PAYING A PLANNING FEE

Fees only — never investments. Money you are investing must go from your own bank account directly to the fund house named in your application. If anyone asks you to send investment money to the account below, or to any Gromore account, it is unauthorised — stop and call us on +91 98318 36282.

ACCOUNT NAME	M/S Gromore Wealth Management Services Private Limited
BANK	Bandhan Bank — Chapra Branch
ACCOUNT TYPE	Current account
ACCOUNT NO.	20100083117957
IFSC	BDBL0000362

Please pay only against an invoice from us, and quote the invoice number as the payment reference. We will never ask for a fee in cash, and we do not take card or UPI payments to any personal account.

Investments are subject to market risks. Read all scheme related documents carefully. Past performance is not indicative of future results. Gromore Investment does not guarantee returns, and does not accept deposits from the public.