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Nippon Life Insurance Company

Wealth Sets You Free Received from Mr/Ms/M/s : _ Request for: Registration of Sip Registration of Sip Insure Registration of Micro Sip

Scheme Name	Plan	Option	Payment Details	
			Amount ₹ Instrument No/Cash Deposit Slip No	Time Stamp & Date
			Date : Drawn on Bank	of receiving office

ONE TIME BANK MANDATE

RELIANCE Wealth Sets You Free MUTUAL

FUND

(NACH / Direct Debit Mandate Form) (Applicable for Lumpsum Additional Purchases as well as SIP Registration)

UMRN (For Office Use Only)				APP No.	
Create Sponsor Bank Code	or Office Use Only)	Utility Code	(For Office Use	Only Date:	0 M M Y Y Y
Modify X I/We hereby authorize Reli	iance Mutual Fund	to debit (tick√	SB CA	CC SB-NRE	SB-NRO Other
Cancel X Bank A/c no: Destination Bank	Account Number)				
With Bank(Name of Destination Ban	ik]	IFSC		MICR	
an amount of Rupees				₹	
FREQUENCY: * Monthly Quarter	rly X Half Yearly	× Yearly ✓ as & wh	en presented DEBIT 1	TYPE X Fixed Amou	nt Maximum Amount
Reference 1 Folio No.		Email ID:			
Reference 2 Appln No.		Mobile / Phone No:			
I agree for the debit of mandate processing charges by	y the bank whom I am auth	orizing to debit my account as	per latest schedule of charges	of the bank.	
PERIOD					
From: D D M M Y Y Y Y	1	2		3	
To: 3 1 1 2 2 0 9 9	Signature of A	ccount Holder	Signature of Account Hol	lder Signatur	re of Account Holder
Or Until Cancelled	Name as in E	Bank Record 2_	Name as in Bank Reco	ord 3Name	e as in Bank Record

This is to confirm that the dedaration (as mentioned overleaf) has been carefully read, understood & made by me / us. I am authorizing the User Entity / Corporate to debit my account, based on the instructions as agreed and signed by me. I have understood that I am authorized to cancel / amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / Corporate or the bank where I have authorized the debit.

SIP INSURE INSTRUCTIONS

- Eligibility
- All individual investors enrolling for investments via SIP and opting for 'Reliance SIP Insure'
- Only individual investors whose entry age is 18 years & more and less than 51 years at the time of investment.
- In case of multiple holders in the any scheme, only the first unit holder will be eligible for the insurance cover.
- An investor shall have the option of choosing for 1 or more than 1 SIP in the same scheme same plan and in the same month. The investor can choose the SIP Dates from 1st to 28th of any given month. More than one SIP for

Documents to be submitted: It is mandatory for each investor to sign and submit the following documents under this facility;

- Application Form (Nomination is mandatory for all investors with mode of holding as single, Joint & Any one or Survivor)
- b. SIPInsure Enrollment / One Time Bank Mandate (OTBM) Authorization Mandate (forms part of Application Form)
- Reliance SIP Insure facility will not be extended to investors applying under the category of Micro SIPs.

erms & Conditions for availing Life Insurance Cover on SIP investments

- Age Limit
- Only individual investors whose entry age is 18 years & more and less than 51 years at the time of investor Cover ceasing age is restricted to 55 years.
 - Charges of Insurance Cover: The insurance cover comes at no extra cost to the investors who are registered/ willing to invest through Reliance SIP Insure in designated schemes that offer this facility.
- Commencement of Insurance Cover

The Insurance cover shall commence after "waiting period" of 45 days from the commencement of SIP installments. However the waiting period will not be applicable in respect of acadental deaths.

Amount of Life Insurance Cover Available

Under Reliance SIP Insure, the investors are provided with life insurance cover without any extra cost (i.e. free of cost) under a Group Term Insurance scheme. The cost of the insurance premia will be bome by the AMC. The Life Insurance Cover under 'SIP Insurer facility will be as per the following dause.

- Year 1 10 Times the equivalent # Monthly SIP Installment
- Year 2 50 Times the equivalent # Monthly SIP Installment
- Year 3 onwards 120 Times the equivalent # Monthly SIP Installment

The above applies to all the frequencies / options

Limits above are subject to maximum coverage of Rs. 50 lakhs per investor*

**Since the limit is per investor, all his existing investments in Reliance SIP Insure across all eligible schemes will be considered for calculating the maximum sum assured limit.

Illustration for Calculation of Life Insurance Cover

Suppose a person has enrolled for SIP under quarterly frequency with installment amount of Rs 3000 per quarter for a period of 3 years and also for yearly frequency with installment amount of Rs 12000 per year for a period of

Following is the way he should calculate the eligible life insurance cover for different years

Step 1-Before he calculates as per the formula, he should find out the equivalent monthly installment for his SIF

For Quarterly frequency, it is 3000/3 = Rs 1000 becomes his equivalent monthly SIP installment

For Yearly frequency, it is 12000/12 = Rs 1000 becomes his equivalent monthly SIP installment

Step 2 - Now he can refer to the formula for calculation of eligible insurance cover (under quarterly as well as yearly frequencies each) which is as follows;

, The Life Insurance Cover under 'Reliance SIP Insure' facility will be as per the following clause;

- Year 1 10 Times the equivalent #Monthly SIP Installment = 10*1000 = Rs. 10,000
- Year 2 50 Times the equivalent # Monthly SIP Installment = 50* 1000 = Rs. 50.000
- Year 3 onwards 120 Times the equivalent # Monthly SIP Installment = 120 * 1000 = Rs. 1,20,000

Minimum Period of Contribution:

Monthly - 36 installments; Quarterly - 12 installments; Yearly - 3 installments

The Life Insurance Cover under "Reliance SIP Insure" facility shall be as per the above terms and conditions, subject to a maximum of Rs 50 lakhs per investor across all schemes / plans and folios across all frequencies / options, in lumpsum, which will be paid/credited to the Nominee's bank account directly by the insurance company, in the event of the death of the Unit Holder (subject to the terms and conditions of the insurance, read along withthe Certificate of Insurance, of the Group Term Insurance policy).

Note: Investors are requested to note the terms and conditions of the respective lock in period dayse that shall be applicable for each SIP Insure installment under the respective Schemels) e.g. 3 years in case of Reliance Tax Saver (ESS) Fund and 5 years in case of Reliance Retirement fund — (Wealth Creation Scheme & Income Generation Scheme)

Insurance cover would cease, if investor redeems (fully / partially) or switches out^ (fully / partially) units before completion of the Reliance SIP Insure tenure or discontinues his SIP before completion of 3 yrs of the opted SIP

^ Switch out/ Auto Transfer between Reliance Retirement Fund - Wealth Creation Scheme to Reliance Retirement

Fund -Income Generation Scheme or vice a versa will not be considered for Cessation of Insurance Cover

However, the insurance cover will continue if the SIP stops after the minimum period of contribution (Monthly - 36 installments) carterly - 12 installments; Yearly - 3 installments) of the opted SIP tenure & the sum assured, in such a scenaria, will be equivalent to the fund value" subject to maximum of 120 times the equivalent # Monthly SIP Installment or max sum assured limit is 50 Lakts whichever is lower. The insurance cover will be confinued till the committed tenure is completed or till 55 yrs of age whichever is earlier.

Fund Value = Value of units, accumulated under SIP Insure, at the last successfully executed SIP date seen from the day on which SIP is discontinued.

The insurance amount as per the above sum assured clause under revised features subject to a maximum of Rs 50 lakhs per investor across all schemes / plans and folios across all frequencies / options, in lumpsum will be paid / credited to the Naminee's bank account directly by the insurance company in the event of the death of the Unit Holder (subject of the terms and conditions of the insurance, read along with the Certificate of Insurance, of the Group Term Insurance policy).

Example on Max Sum Assured Calculation for more details (amount in lakhs)

Sum Assured for old SIP insure registration (A) Rs. (Max Cover – 10 lakhs)	Sum Assured for new SIP insure registration (B)Rs. (Max Cover – 21 lakhs)	Sum Assured for new SIP insure registration (B)Rs. (Max Cover – 50 lakhs)	C = (A + B+C) Rs.	Sum Assured Eligibility Lower of C or Rs.50 lakhs
10	4	25	39	39
10	20	30	60	50
7	20	28	55	50
7	13	29	49	49

Since the limit is per investor, all his existing investments in Reliance SIP Insure across all eligible schemes will be treated as per existing features and will also be considered for calculating the maximum sum assured limit; if investor is also registered under Revised Reliance SIP insure facility, in asse the investor is not registered under revised Reliance SIP insure facility the old provision shall be applicable to investor.

Type of Investors	Registrations done before 15th Oct 2015	Registrations done after 15th Oct 2015 but before 1st Jun 2018	Registrations done after 1st Jun 2018	Max Sum Assured Applicable (amt in lakhs)
Existing Investors	Yes	No	No	10
Existing Investors	No	Yes	No	21
Existing Investors	Yes	Yes	No	21
Existing Investors	Yes	No	Yes	50
Existing Investors	No	Yes	Yes	50
Existing Investors	Yes	Yes	Yes	50
New Investors	No	No	Yes	50

- Designated Schemes in which Relignate SIP Insure will be offered:
 - Relignce Growth Fund
 - Reliance Vision Fund
 - Reliance Retirement Fund
 - Reliance Tax Saver (ELSS)
 - Reliance Large Cap Fund
 - Religence Value Fund Reliance Multi Cap Fund
 - Reliance Small Cap Fund
 - Reliance Banking Fund
 - Reliance Pharma Fund Reliance Power & Infra Fund
 - Reliance Consumption Fund
 - Relignce Focused Equity Fund
 - Reliance Balanced Advantage Fund
 - Reliance Equity Hybrid Fund
 - Reliance Equity Savings Fund
 - Reliance Hybrid Bond Fund
- SIP Amount

Monthly - Rs. 500 per month & in multiples of Re 1 thereafter Quarterly - Rs. 1500 per quarter & in multiples of Re1 thereafter Yearly - Rs. 6000 per year & in multiples of Re 1 thereafter

1/We hereby declare that the particulars given on this mandate are correct and complete. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We would not hold Reliance Mutual Fund, their representatives, service providers, participating banks & other user institutions responsible. I/We have read the Terms & Conditions and agree to discharge the responsibility expected of me/us as a participant/s under the scheme. I/We authorize use of above mentioned contact details for the purpose of this specific mandate instruction processing. I/We hereby confirm adherence to terms on this mandat

Authorisation to Bank: I/We wish to inform you that I/we have registered with Reliance Mutual Fund for NACH / Direct Debit through their authorised Service Provider(s) and representative for my/our payment to the above mentioned beneficiary by debit to my/our above mentioned bank account. For this purpose I/We hereby approve to raise a debit to my/our above mentioned account with your branch. I/We hereby authorize you to honor all such requests received through to debit my/our account with the amount requested, for due remittance of the proceeds to the beneficiary.

FOR OFFICE USE ONLY (Not to be filled in by Investor)					
Affix Barcode	Date and Time Stamp No.				



(Except for Reliance Tax Saver (ELSS) Fund & Reliance Retirement Fund where minimum installment is as follows: Monthly option - Rs. 500 p.m. and in multiples of Rs 500 thereafter

Quarterly option - Rs. 1500 per quarter & in multiples of Rs 500 thereafter

Yearly option - Rs 6000 per year & in multiple of Rs 500 thereafter)

There is no upper limit.

SIP Tenure

- Minimum Period of Contribution: Monthly 36 installments: Quarterly 12 installments: Yearly 3 installments
- Maximum Period of Contribution for SIP: No upper limit for SIP tenure. The investor can opt for Perpetual SIP also
- Maximum Period of Contribution for SIP Insure (for seeking Insurance cover): Upto completion of payment of all the monthly installments as registered or till attaining 55 years of age whichever is earlier, [e.g., a person can register an SIP of maximum 10 yrs at the age of 45 yrs]. The insurance cover ceases when the investor attains 55 years of age or the completion of the SIP insure tenure whichever is earlier.
- In case the investor has opted for perpetual SIP Insure then the insurance cover will cease when the investor affains 55 years of age howeverthe SIP will still confine.

(VIIII) Load structure

- The Entry Load under Relianæ SIP Insure shall be Nil in the respective designated schemes. In terms of SBI circular no. SEBI/NDC/IR No.4/168230/09 dated June 30, 2009, no entry load will be charged bythe Scheme the investor effective August 1, 2009. Upfront commission shall be paid directly by the investor to the AMR registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor.
- Exit load strudure as prevailing at the time of investment /registration of SIP in the respective eligible schemes of Reliance SIP Insure shall be applicable. 2

(DX) SIP dates

- SIP auto debit facility is available only on specific dates of the month i.e. investor can choose the SIP Dates from 1st to 28th of any given month.
- 2 The first SIP installment could be submitted on any working day. However the subsequent installments from 1st to 28th of every month
- 3. Please submit the required documents for SIP atleast 21 working days before the first SIP date for Auto Debit
- Please read Instructions cum Terms and Conditions of OTBM + SIPEnrolment Form.
- (X) Frequency of SIP: Monthly, Quarterly or Yearly basis
- Mode of payment

SIPs will be accepted through One Time Bank Mandate to the investor's bank account under this facility. Post dated cheques will not be accepted in case of Fresh SIP insure requests.

(XII) Cessation of Insurance Cover

The insurance cover shall cease upon occurrence of any of the following:

- At the end of mandated Reliance SIP Insure tenure, i.e., upon completion of payment of all the installments as registered or till attaining 55 years of age whichever is earlier
- Discontinuation of SIP installments before completing the minimum period of contribution (Monthly ~36 installments; Quarterly ~12 installments; Yearly ~3 installments) of the opted SIP tenure

 Partial or Full Redemption / switch-out* of units purchased under Reliance SIP Insure before completion of the mandated SIP tenure / installments or till attaining 55 years of age, whichever is earlier
- In case of default in payment of three consecutive monthly /quarterly /yearly SIP installments or five separate occasions in Monthly / Quarterly/ Yearly SIP installments of such defaults during the tenure of the SIP duration chosen or till attaining 55 years of age, whichever is earlier.

^Switch out / Auto transfer between Reliance Retirement Fund - Wealth Creation Scheme to Reliance Refirement Fund - Wealth Creation Scheme to Reliance Refirement Fund - Income Generation Scheme or vice a versa will not be considered for Cessation of Insurance Cover.

Exclusions for Insurance cover

No insurance cover shall be admissible in respect of death of the SIP-Insure unitholder (the insured person) on account of -

- Death due to suicide shall be dealt with as per IRDAI Regulations
- Death within 45 days from the commencement of SIP installments except for death due to accident.
- Death due to pre-existing illness, disease(s) or accident which has occurred prior to the start of cover.
- Death due to pre-existing illness, disease(s) or accident which has occurred prior to the start of ower.

 Free life insurance cover provided as a part of an add on feature called as Reliance SIP Insurer is arranged and funded by Reliance Nippon Life Asset Management Limited through "Reliance Group Term Assurance Plus" (LIIN 12NI)04V(II) of Reliance Nippon Life Insurance Company Limited (IRDAI Reg. No. 121). On exercising an option to become a member of insurance scheme, the death benefit is Isubject to the terms and conditions of the insurance, read along with the Certificate of Insurance, of the Group Term Assurance Plus Policy), shall be paid/ realited directly to investor's nominee by Reliance Nippon Life Insurance Company Limited. The investor is advised to refer to detailed soles brochure of Reliance Group Term Assurance Plus before deciding to got for insurance cover. Please refer to https://www.reliancenipponlife.com/ for mare details. There is no compulsion whatsoever that this insurance cover has to be taken together with SIP. SIP is also available without insurance cover.

 Reliance SIP insure is a special feature available under selected schemes of Reliance Mutual Fund and is sub-limits, operating guidelines, terms and conditions. Investors are requested to refer to the Scheme Insufficial Information Document (SID), Statement of Additional Information BAI), Key Information Memorandum KIWI cum Application Form for further details.

The information herein above is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers. Before making any investments, the readers are advised to seek independent professional advice, verify the contents in order to arrive at an informed investment decision.

None of the Sponsors, the Investment Manager, the Trustee, their respective directors, employees, affiliates or representatives shall be liable in any way for any dired, indirect, special, incidental, consequential, punitive or exemplary damages, including on account of lost profits arising from the information contained in this material.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.