Prudent

— Money through wisdom —

THE POWER OF ONE

ONE FORM | ONE SIGNATURE | ONE REGISTRATION

Introducing the enhanced PAN based

COMMON ONE TIME MANDATE

for any number of SIPs and investments in any Mutual Fund.

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Common OTM brings the following benefits:

COMMON ONE TIME MANDATE

- No one enjoys filling forms. Especially if it has to be repeated. With the enhanced PAN – based Common One Time Mandate from CAMS, investments can be done in any number of SIPs across all funds serviced by CAMS – with just one mandate. No more filling up separate mandate every time a Systematic Investment Plan (SIP) is started / renewed. Once the Common OTM is registered, starting/renewing SIP is a breeze just by quoting the unique common mandate registration number.

- Free yourself from cumbersome forms, procedures and cheques with the power of Common One Time Mandate.

- **Common OTM**
  across all CAMS serviced Funds eliminates paper work and process time associated with separate mandate registration for each SIP.

- **Faster commencement of SIPs**
  When submitted with registered Common OTM reference, new SIPs andrenewal SIPs can be commenced in 5 – 7 days as against individual mandate registration time of 20- 30 days

- **Freedom from dates and restrictions**
  Any date, Any number of transactions. Common OTM is set up for "As and when presented" option and hence does not have date restrictions. Any number of transactions can be presented for any date. The mandate amount is applied for each transaction.

  Common OTM registration can be done across **800+ banks** Elimination of time spent on rework and resubmission when mandates are rejected

Important Points Should be Kept In Mind While Filling CAMS Common Application Form

- These Application forms can be submitted for all CAMS related AMCs.
- Cams Common Application form to be submitted at **"CAMS"** office only. (till further intimation)
- First Page of Common Form – Sr. 1 - Fund Name - Mention only **AMC** Name not a **Scheme Name.**
- Don't change default option **(Frequency and Debit Type)** given on Cams OTM Form.
- Investor consent on Cams OTM Form is mandatory to fill and signed by investor.
- OTM will get Registered within 15-30 days **(Depends upon Banks)**
- After Successful Registration of OTM Investor will receive **SMS/Email/Letter**
- Multiple Mandate Can be registered **(But avoid it)**
- No Restrictions on the Number of SIP **(Subject to Maximum amount limit)** once the OTM is registered.
- SIP and STP dates to be selected as per the AMC **(Attached date chart)**
- Do not use CAMS Common application Form for Special Products and SIP insure of Particular AMC.

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SIP, STP & SWP Dates

RTA	Fund	SIP Date	Dates NOT available in Common Application form for SIP	STP Date	Dates NOT available in Common Application form for STP	SWP Date
CAMS	360 ONE Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Aditya Birla Sun Life Mutual Fund	Any date	Yes	1, 7, 10, 14, 21 & 28	14, 21 & 28	1, 7, 10, 14, 21 & 28
CAMS	Bandhan Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	DSP Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Franklin Templeton Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	HDFC Mutual Fund	Any date	Yes	Any date	NA	Any date
CAMS	Helios Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	HSBC Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	ICICI Prudential Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Kotak Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Mahindra Manulife Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Navi Mutual Fund	Any date	Yes	1, 7, 10, 15, 20 & 25	Yes	1, 7, 10, 15, 20 & 25
CAMS	PPFAS Mutual Fund	Any date	Yes	Any date	NA	Any date
CAMS	SBI Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	Shriram Mutual Fund	1 to 28	Yes	1, 5, 15, 20 & 25	NA	1, 5, 15, 20 & 25
CAMS	Tata Mutual Fund	Any date	Yes	1, 7, 10, 20 & 28	28	1, 7, 10, 20 & 28
CAMS	Union Mutual Fund	Any date	Yes	Any date	Yes	Any date
CAMS	WhiteOak Capital Mutual Fund	1 to 28	Yes	1 to 28	Yes	1 to 28

Scenario	Form
One Time Purchase	Filled Common Application Form compulsory & Investor want to Registered his OTM in CAMS, he has to submitted also OTM mandate with Amount Cheque.
First time SIP	Common application Form and Cams OTM
SIP in existing Folio and If Cams OTM is registered	Only SIP Registration form
SIP in existing Folio and If Cams OTM is not registered	SIP Registration form and Cams OTM
Fresh SIP and If Cams OTM is registered	Only Common application form

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FREQUENTLY ASKED QUESTIONS

1) What is CAMS Common One Time mandate?

The facility of setting up a debit mandate in the investor's bank account towards seamless funding of SIP (Systematic Investment Plan) transaction has been in vogue for some time now. However, investors have to provide a separate mandate for each SIP leading to additional paper work and registration process at bank end which often takes 15 – 30 days (depending on the bank), thus delaying commencement of a new SIP. Such mandates were also for fixed date and hence restricted for SIP transactions only

CAMS Common One Time Mandate (OTM) is an enhanced PAN based mandate that will be registered centrally at a PAN level rather than for a specific SIP with one Mutual Fund. Being a common mandate, it will be available for transactions across all CAMS serviced Funds. As the CAMS Common OTM is registered for "as and when presented" than for a SIP specific date, the mandate can be used for any number of SIPs and lumpsum transactions across any Mutual Fund serviced by CAMS. Once the mandate is registered, the unique registration number is all that the investor needs to quote for making lumpsum transactions and new SIP registration.

2) What are the benefits of CAMS Common OTM?

Presently OTM is registered with each AMC at folio level, usually for each SIP. CAMS Common OTM offers the convenience of registering OTM at PAN level authorizing CAMS to debit your bank account towards the transaction in any Mutual Fund serviced by CAMS.

CAMS Common OTM brings the following significant benefits

One-time registration - eliminates paper work and process time associated with separate mandate registration for each SIP

Convenience to register new SIP/ renew SIP quickly – current model of mandate registration lag time (usually from 15 – 30 days) is eliminated

3) Do I need to have an account with any specific bank to register for CAMS Common OTM facility?

No. The OTM facility is not restricted to a particular bank/ branch/ location. As long as a bank is participating in the NACH (National Automated Clearing House) system, you can register CAMS Common OTM facility for any of the bank branches. Presently, CAMS Common OTM can be registered across 800+ Banks where most mutual fund investors are likely to have their account.

4) Can I transact for any amount once the mandate is registered?

Investor needs to provide an upper limit amount in the mandate form. This limit is applicable for every debit instruction that is presented to the bank account. As the upper limit amount is applicable for every transaction, multiple transactions can be presented on the same day. However, no single transaction can exceed the upper limit set in the mandate.

5) How do I register CAMS Common OTM? Do I have to be an investor for registering Common Mandate?

You do not have to be an existing investor to register for Common OTM. You can provide the CAMS Common OTM along with your first SIP. Once the mandate is registered, any subsequent SIPs/ lumpsum in any CAMS serviced Mutual Fund can be linked to this mandate.

If you are an existing investor in any of the CAMS serviced Mutual Funds, you can give a standalone Common OTM which will be registered centrally at a PAN level and be made available for any subsequent new SIP or lump sum transaction in any of the CAMS serviced Mutual Fund.

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FREQUENTLY ASKED QUESTIONS

6) What are the documents are required for setting Common OTM and where do I submit?
You can access CAMS Common OTM form from Partner Desk under Form Automation, Alternately, printed forms are available at the nearest Prudent Branch. The filled forms can be submitted to your nearest Prudent Branch. No additional documents are required besides the completed form.

7) In how many days will CAMS Common OTM get registered?
Mandate registration varies from bank to bank. It can take from 12 days to 30 days. Once the mandate is registered, subsequent new SIPs can be initiated with this readily set-up mandate

8) How, will I come to know about the successful registration of CAMS Common OTM After successful registration, a SMS/email/letter will be sent to the investor. The email and letter will contain CAMS Common Mandate unique registration number. CAMSOTM number is easy to remember, it is acombination of your PAN, last 4 digits of your bank account number and a two digit serial number from 01 to 99

9) How do I set up new SIP using CAMS Common OTM?
Paper based SIP Registration forms provide a section for mandate registration. You can specify CAMS Common OTM No. XXXXXXXXXXXXXXX in this section.

CAMS will set up the SIP and use the registered Common OTM to debit your account on the SIP due date.

10) I don't remember the folios in each of the AMCs, I have invested. How do I register?
The Common One Time mandate is registered at PAN level of the first holder. There is no requirement to quote folio number while registering for CAMS Common OTM.

11) Can I register multiple Common One Time mandates?
Yes, multiple mandates can be registered at bank and a/c number level.

12) How many SIPs can I register through the OTM facility?
There is no restriction on the number of SIPs that can be registered through the Common OTM facility.

13) What if I forget CAMS Common OTM Number?
You can walk into nearest CAMS CSC, quote your PAN and obtain CAMS Common Mandate Number. You can also send SMS to a designated number with the specified text / or call our Toll Free Call (18002002267) center to get the CAMS Common OTM Number.

14) I have already registered OTM with some Mutual Funds. If I provide CAMS Common OTM will those mandates get cancelled?
No. Existing registered mandates will not be cancelled when CAMS Common OTM is set up. When transacting in those specific MFs, you will have the choice of MF specific OTM or CAMS Common OTM. While transacting in any new fund where you do not already have a mandate,

15) How do I cancel CAMS Common OTM registration?
You can request for cancellation of the CAMS Common OTM facility by submitting the 'One Time Debit Mandate Form' and indicate cancellation.

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thank you

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