

FOLIO CONSOLIDATION REQUISITION

(For existing Unitholders only)



I/We wish to consolidate all my/our below mentioned folio numbers into a single folio.

Date: _____

Source Folios for Consolidation (Folios where the following are identical can be consolidated - Unitholders' Names & Address, Order of Unitholders, Nominee details and Tax Status):

1.		2.	
3.		4.	
5.		7.	
6.		8.	

Investor may attach a separate page giving details of folios in case there are more than 10 folios.

Target Folio Number (Mention the target folio here, wherein all folios to be consolidated - single folio no.):

Contact Details (Mention your contact details here for easy communication):

	Mobile No.	E-mail address
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Declaration and Signatures: I/We understand that consolidation of folios will be effected only if the following information is identical in all folios specified by me/us:

• Name of unit holder(s) • Address of unit holder(s) • Order of unit holder(s) • Mode of holding • Tax Status

Name of the Sole/First Unitholder	SIGNATURE(S)	First Unitholder
Name of the Second Unitholder		Second Unitholder
Name of the Third Unitholder		Third Unitholder

ACKNOWLEDGEMENT: FOLIO CONSOLIDATION FORM - BARODA MUTUAL FUND

Source Folios for Consolidation:				
Target Folio Number:				

Receiver's Signature & Seal

TERMS & CONDITIONS:

- 1) The form should be in order else the request is liable to be rejected.
- 2) The form is signed by the holder/s as per the holdings.
- 3) I/ We agree that the Bank Mandate, Contact details & Nominee(s) mentioned in the Target Folio shall prevail post consolidation.
- 4) I/We confirm that there is no pledge/lien marked in these folios and acknowledge that such folios, will require financier's consent for consolidation and hence these may be ignored for consolidation, if we have mentioned any such folio(s).
- 5) I/We agree that Folio consolidation shall not happen for Investment through Guardian (Minor) or through Power of Attorney (POA). However, the consolidation is possible between two or more Minor Folios / POA Folios, provided the above condition is met.
- 6) Demat Folios cannot be consolidated.
- 7) All other details viz occupation, gross annual income, etc to be updated as registered under the Target Folio as mentioned above.