

NJPMS SIP ENROLLMENT FORM

Date

D	D	M	M	Y	Y
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NJ ADVISORY SERVICES PRIVATE LIMITED

Portfolio Manager

Registration No.:INP000003518

9th Floor, B Tower, Udhna Udyognagar Sangh

Commercial Complex, Central Road No.10,

Udhna, Surat – 394210, Gujarat.

Request for Investment through Post dated Cheques

1) I/We the undersigned, hold PMS Account No.

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 with your Company.

2) Name of the Strategy (Please tick (✓) whichever is applicable)

☐ Freedom Portfolio Strategy

OR

☐ Dynamic Asset Allocation Portfolio Strategy

3) Frequency (Please tick (✓) any one only)

☐ Monthly SIP (Min 6 installment & Max 12 installment)

☐ Quarterly SIP (Min 4 installment & Max 8 installment)

4) Enrolment Period

From

D	D	M	M	Y	Y
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To

D	D	M	M	Y	Y
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5) Cheque(s) Details

Cheque Number(s)		Dated (DD/MM/YY)	Amount (Rs.)	Cheque Number(s)		Dated (DD/MM/YY)	Amount (Rs.)
1				7			
2				8			
3				9			
4				10			
5				11			
6				12			
(All cheques should be of same amount)				Total(Rs.)			

Cheques drawn on

Bank Name	
Branch	

Account Type (Please tick ✓)

☐ Savings

☐ Current

☐ Others (please specify) _____

6) FULL NAME IN BLOCK LETTERS

1st Holder Name										F	I	R	S	T		N	A	M	E									M	I	D	D	L	E					
N	A	M	E																										L	A	S	T		N	A	M	E	
Signature																																						

2 nd Holder Name										F	I	R	S	T		N	A	M	E									M	I	D	D	L	E					
N	A	M	E																										L	A	S	T		N	A	M	E	
Signature																																						

3 rd Holder Name										F	I	R	S	T		N	A	M	E									M	I	D	D	L	E					
N	A	M	E																										L	A	S	T		N	A	M	E	
Signature																																						



Advisory Services |

NJPMS SIP ENROLLMENT- TERMS & CONDITIONS

Terms & Conditions

- 1 Client should be an existing NJ PMS client for availing this mode of investment / top up into his NJ PMS Portfolio and his Investment Value should be at least Rs. 25 Lacs or more.
- 2 Minimum Application amount is Rs. 25,000/- and in multiples of Rs. 1000/- thereafter.
- 3 There are monthly and quarterly frequencies for SIP.
- 4 For Monthly option a minimum of 6 & maximum of 12 installments can be registered
- 5 For Quarterly option a minimum of 4 & maximum of 8 installments can be registered
- 6 Only calendar quarters should be considered for Quarterly SIP in NJPMS. (March, June, September, December)
- 7 SIP dates are 10th or 25th day of the month or quarter.
- 8 SIP application should reach NJ Head Office at least 15 days ago of the first SIP installment date.
- 9 Cheques should be drawn in favor of the first holder.
- 10 We will accept "AT PAR" cheques only.
- 11 All charges as applicable at the time of activation of NJPMS will apply on each installment.
- 12 Please provide Bank Statement as proof if the cheques for SIP Installment are issue from a bank other than the bank details provided during the PMS registration.

