

mahindra FINANCE

Mahindra & Mahindra Financial Services Limited

CIN: L65921MH1991PLC059642

FD PROCESSING CENTRE

4th Floor, Asv Ramana Towers At No.37 & 38, Venkat Narayana Road, T Nagar, Chennai, Tamil Nadu-600017

• Toll Free No: 18002669266 • Boardline No: 022-66523500 (Monday to Friday between 10.00 am to 5.00 pm) • Email: mfinfd@mahindra.com

CRISIL RATINGS
AAA/STABLE
INDICATES HIGHEST SAFETY

SAMRUDDHI
FIXED DEPOSITS

INDIA RATINGS
IND AAA/STABLE
INDICATES HIGHEST SAFETY

SAMRUDDHI DEPOSIT UP TO Rs.5 Crore

SAMRUDDHI CUMULATIVE SCHEME

SAMRUDDHI NON-CUMULATIVE SCHEME

| Minimum Amount | Period (Months) | Amount Payable (Rs.) | Interest p.a.†\$ |
|----------------|-----------------|----------------------|------------------|
| Rs 5,000† | 12 | 5375 | 7.50% |
| | 24 | 5810 | 7.80% |
| | 36 | 6316 | 8.10% |
| | 48 | 6815 | 8.05% |
| | 60 | 7381 | 8.10% |

| Period (Months) | Interest p.a.*#/\$ (Monthly) | Interest p.a.*#/\$ (Quarterly) | Interest p.a.*#/\$ (Half Yearly) | Interest p.a.*#/\$ (Yearly) |
|-----------------|------------------------------|--------------------------------|----------------------------------|-----------------------------|
| 12 | 7.10% | 7.20% | 7.25% | 7.50% |
| 24 | 7.30% | 7.40% | 7.55% | 7.80% |
| 36 | 7.55% | 7.65% | 7.85% | 8.10% |
| 48 | 7.50% | 7.60% | 7.80% | 8.05% |
| 60 | 7.55% | 7.65% | 7.85% | 8.10% |
| Minimum Amount | Rs. 50,000† | | Rs. 25,000† | |

Rules w.e.f. 25th April 2024.

Note :-
* Senior Citizens will get an additional interest rate of 0.25% p.a. for Samruddhi Deposits and 0.10% p.a. additional rate for Dhanruddhi Deposits up to 5 Cr only.
† Employees/Employees' relatives and Retired Employees/Retired Employees' relatives will get an additional rate of 0.35% p.a. for deposits up to Rs. 5 Crore in Samruddhi Deposits only (All Mahindra Group).
Government approved relationship proof documents to be furnished. Employee must be the second applicant. The additional rate of 0.35% is not applicable for Dhanruddhi Deposits.
The additional rate of 0.25% and 0.35% is not applicable for Samruddhi deposits above Rs. 5 Crore.
‡ Additional amount will be accepted in multiples of Rs. 1,000/- and thereafter.
The Non-Cumulative interest will be paid through NACH/NEFT. The date for interest payment will be, for Half yearly on 30th September and 31st March, for Quarterly on 30th June, 30th September, 31st December and 31st March.
If the deposit is made within a period of 1 month prior to any of the payout date, the interest of part period will be paid on the next interest payment date without any deferral interest for the broken period.
\$ Compounded Annually-in case of Cumulative Deposits, interest is compounded before deduction of Tax.
Samruddhi - Cumulative and Non-Cumulative Deposits: Applications can be submitted physically or through online mode.
0.10% additional interest rate will be applicable on Renewals of Public and Senior citizen deposits Upto 5 Crore

Interest rates/Credit rating are subject to change and the interest rates/Credit rating applicable will be the prevailing interest rates/Credit rating as on the date of Deposit

Please Note: • Renewals will be accepted in the Scheme prevailing on date of maturity. Principal/ Principal with interest amount will be renewed in case of renewal

Forms can also be downloaded from Company's Website: www.mahindrafinance.com

Application Forms can be submitted at the designated offices of MMFSL / Collection Banks as mentioned below:

MMFSL REGIONAL OFFICES

Office Address : 302, Amiti Building, Agastya Corporate Park, Opposite Fire Brigade Station, Lbs Road, Kamani Junction, Kurla West, Mumbai - 400 070.

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| AMHERST REGIONAL OFFICE: 1ST, 2ND, 3RD FLOOR CITY MALL COMPLEX, S.5 HIGH WAY, BEVERLY HILLS, CALIF. ABOVE ASV RAY RESTAURANT, AMHERST, MA 01001. TEL: 978-261-1111. FAX: 978-261-1112. WWW.AMHERSTMA.COM | CHICAGO REGIONAL OFFICE: 2ND FLOOR, 1ST FLOOR, 2ND FLOOR, 3RD FLOOR, 4TH FLOOR, 5TH FLOOR, 6TH FLOOR, 7TH FLOOR, 8TH FLOOR, 9TH FLOOR, 10TH FLOOR, 11TH FLOOR, 12TH FLOOR, 13TH FLOOR, 14TH FLOOR, 15TH FLOOR, 16TH FLOOR, 17TH FLOOR, 18TH FLOOR, 19TH FLOOR, 20TH FLOOR, 21ST FLOOR, 22ND FLOOR, 23RD FLOOR, 24TH FLOOR, 25TH FLOOR, 26TH FLOOR, 27TH FLOOR, 28TH FLOOR, 29TH FLOOR, 30TH FLOOR, 31ST FLOOR, 32ND FLOOR, 33RD FLOOR, 34TH FLOOR, 35TH FLOOR, 36TH FLOOR, 37TH FLOOR, 38TH FLOOR, 39TH FLOOR, 40TH FLOOR, 41ST FLOOR, 42ND FLOOR, 43RD FLOOR, 44TH FLOOR, 45TH FLOOR, 46TH FLOOR, 47TH FLOOR, 48TH FLOOR, 49TH FLOOR, 50TH FLOOR, 51ST FLOOR, 52ND FLOOR, 53RD FLOOR, 54TH FLOOR, 55TH FLOOR, 56TH FLOOR, 57TH FLOOR, 58TH FLOOR, 59TH FLOOR, 60TH FLOOR, 61ST FLOOR, 62ND FLOOR, 63RD FLOOR, 64TH FLOOR, 65TH FLOOR, 66TH FLOOR, 67TH FLOOR, 68TH FLOOR, 69TH FLOOR, 70TH FLOOR, 71ST FLOOR, 72ND FLOOR, 73RD FLOOR, 74TH FLOOR, 75TH FLOOR, 76TH FLOOR, 77TH FLOOR, 78TH FLOOR, 79TH FLOOR, 80TH FLOOR, 81ST FLOOR, 82ND FLOOR, 83RD FLOOR, 84TH FLOOR, 85TH FLOOR, 86TH FLOOR, 87TH FLOOR, 88TH FLOOR, 89TH FLOOR, 90TH FLOOR, 91ST FLOOR, 92ND FLOOR, 93RD FLOOR, 94TH FLOOR, 95TH FLOOR, 96TH FLOOR, 97TH FLOOR, 98TH FLOOR, 99TH FLOOR, 100TH FLOOR, 101ST FLOOR, 102ND FLOOR, 103RD FLOOR, 104TH FLOOR, 105TH FLOOR, 106TH FLOOR, 107TH FLOOR, 108TH FLOOR, 109TH FLOOR, 110TH FLOOR, 111TH FLOOR, 112TH FLOOR, 113TH FLOOR, 114TH FLOOR, 115TH FLOOR, 116TH FLOOR, 117TH FLOOR, 118TH FLOOR, 119TH FLOOR, 120TH FLOOR, 121ST FLOOR, 122ND FLOOR, 123RD FLOOR, 124TH FLOOR, 125TH FLOOR, 126TH FLOOR, 127TH FLOOR, 128TH FLOOR, 129TH FLOOR, 130TH FLOOR, 131ST FLOOR, 132ND FLOOR, 133RD FLOOR, 134TH FLOOR, 135TH FLOOR, 136TH FLOOR, 137TH FLOOR, 138TH FLOOR, 139TH FLOOR, 140TH FLOOR, 141ST FLOOR, 142ND FLOOR, 143RD FLOOR, 144TH FLOOR, 145TH FLOOR, 146TH FLOOR, 147TH FLOOR, 148TH FLOOR, 149TH FLOOR, 150TH FLOOR, 151ST FLOOR, 152ND FLOOR, 153RD FLOOR, 154TH FLOOR, 155TH FLOOR, 156TH FLOOR, 157TH FLOOR, 158TH 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1005TH FLOOR, 1006TH FLOOR, 1007TH FLOOR, 1008TH FLOOR, 1009TH FLOOR, 1010TH FLOOR, 1011ST FLOOR, 1012ND FLOOR, 1013RD FLOOR, 1014TH FLOOR, 1015TH FLOOR, 1016TH FLOOR, 1017TH FLOOR, 1018TH FLOOR, 1019TH FLOOR, 1020TH FLOOR, 1021ST FLOOR, 1022ND FLOOR, 1023RD FLOOR, 1024TH FLOOR, 1025TH FLOOR, 1026TH FLOOR, 1027TH FLOOR, 1028TH FLOOR, 1029TH FLOOR, 1030TH FLOOR, 1031ST FLOOR, 1032ND FLOOR, 1033RD FLOOR, 1034TH FLOOR, 1035TH FLOOR, 1036TH FLOOR, 1037TH FLOOR, 1038TH FLOOR, 1039TH FLOOR, 1040TH FLOOR, 1041ST FLOOR, 1042ND FLOOR, 1043RD FLOOR, 1044TH FLOOR, 1045TH FLOOR, 1046TH FLOOR, 1047TH FLOOR, 1048TH FLOOR, 1049TH FLOOR, 1050TH FLOOR, 1051ST FLOOR, 1052ND FLOOR, 1053RD FLOOR, 1054TH FLOOR, 1055TH FLOOR, 1056TH FLOOR, 1057TH FLOOR, 1058TH FLOOR, 1059TH FLOOR, 1060TH FLOOR, 1061ST FLOOR, 1062ND FLOOR, 1063RD FLOOR, 1064TH FLOOR, 1065TH FLOOR, 1066TH FLOOR, 1067TH FLOOR, 1068TH FLOOR, 1069TH FLOOR, 1070TH FLOOR, 1071ST FLOOR, 1072ND FLOOR, 1073RD FLOOR, 1074TH FLOOR, 1075TH FLOOR, 1076TH FLOOR, 1077TH FLOOR, 1078TH FLOOR, 1079TH FLOOR, 1080TH FLOOR, 1081ST FLOOR, 1082ND FLOOR, 1083RD FLOOR, 1084TH FLOOR, 1085TH FLOOR, 1086TH FLOOR, 1087TH FLOOR, 1088TH FLOOR, 1089TH FLOOR, 1090TH FLOOR, 1091ST FLOOR, 1092ND FLOOR, 1093RD FLOOR, 1094TH FLOOR, 1095TH FLOOR, 1096TH FLOOR, 1097TH FLOOR, 1098TH FLOOR, 1099TH FLOOR, 1100TH FLOOR, 1101ST FLOOR, 1102ND FLOOR, 1103RD FLOOR, 1104TH FLOOR, 1105TH FLOOR, 1106TH FLOOR, 1107TH FLOOR, 1108TH FLOOR, 1109TH FLOOR, 1110TH FLOOR, 1111ST FLOOR, 1112ND FLOOR, 1113RD FLOOR, 1114TH FLOOR, 1115TH FLOOR, 1116TH FLOOR, 1117TH FLOOR, 1118TH FLOOR, 1119TH FLOOR, 1120TH FLOOR, 1121ST FLOOR, 1122ND FLOOR, 1123RD FLOOR, 1124TH FLOOR, 1125TH FLOOR, 1126TH FLOOR, 1127TH FLOOR, 1128TH FLOOR, 1129TH FLOOR, 1130TH FLOOR, 1131ST FLOOR, 1132ND FLOOR, 1133RD FLOOR, 1134TH FLOOR, 1135TH FLOOR, 1136TH FLOOR, 1137TH FLOOR, 1138TH FLOOR, 1139TH FLOOR, 1140TH FLOOR, 1141ST FLOOR, 1142ND FLOOR, 1143RD FLOOR, 1144TH FLOOR, 1145TH FLOOR, 1146TH FLOOR, 1147TH FLOOR, 1148TH FLOOR, 1149TH FLOOR, 1150TH FLOOR, 1151ST FLOOR, 1152ND FLOOR, 1153RD FLOOR, 1154TH FLOOR, 1155TH FLOOR, 1156TH FLOOR, 1157TH FLOOR, 1158TH FLOOR, 1159TH FLOOR, 1160TH FLOOR, 1161ST FLOOR, 1162ND FLOOR, 1163RD FLOOR, 1164TH FLOOR, 1165TH FLOOR, 1166TH FLOOR, 1167TH FLOOR, 1168TH FLOOR, 1169TH FLOOR, 1170TH FLOOR, 1171ST FLOOR, 1172ND FLOOR, 1173RD FLOOR, 1174TH FLOOR, 1175TH FLOOR, 1176TH FLOOR, 1177TH FLOOR, 1178TH FLOOR, 1179TH FLOOR, 1180TH FLOOR, 1181ST FLOOR, 1182ND FLOOR, 1183RD FLOOR, 1184TH FLOOR, 1185TH FLOOR, 1186TH FLOOR, 1187TH FLOOR, 1188TH FLOOR, 1189TH FLOOR, 1190TH FLOOR, 1191ST FLOOR, 1192ND FLOOR, 1193RD FLOOR, 1194TH FLOOR, 1195TH FLOOR, 1196TH FLOOR, 1197TH FLOOR, 1198TH FLOOR, 1199TH FLOOR, 1200TH FLOOR, 1201ST FLOOR, 1202ND FLOOR, 1203RD FLOOR, 1204TH FLOOR, 1205TH FLOOR, 1206TH FLOOR, 1207TH FLOOR, 1208TH FLOOR, 1209TH FLOOR, 1210TH FLOOR, 1211ST FLOOR, 1212ND FLOOR, 1213RD FLOOR, 1214TH FLOOR, 1215TH FLOOR, 1216TH FLOOR, 1217TH FLOOR, 1218TH FLOOR, 1219TH FLOOR, 1220TH FLOOR, 12 |
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100411

Mahindra & Mahindra Financial Services Limited

APPL. No.

CIN: L65921MH1991PLC059642

APPLICATION FORM FOR FIXED DEPOSIT UPTO 5 CRORE
(Please write in BLOCK LETTERS and [✓] the appropriate box)

SME-Sketch Code

Agents are not permitted to accept cash with application form & issue receipt. Mahindra and Mahindra Financial Services Limited will in no way be responsible for such or other wrong tenders.

* I / we hereby apply for a fixed deposit with your company at the current prevailing interest rate as on today, as per the details below:-
To know more about latest FD schemes & interest rate, depositors are advised to visit our website www.mahindrafinance.com on or before making investment

Cumulative

Non-Cumulative

☐ 12 Months☐ 24 Months☐ 36 Months☐ 12 Months☐ 24 Months☐ 36 Months☐ 48 Months☐ 60 Months☐ 48 Months☐ 60 MonthsExisting FDR/ Folio Interest Payment Frequency ☐ Monthly ☐ Quarterly ☐ Half Yearly ☐ YearlyAuto Renewal: Yes ☐ No ☐Renewal for: ☐ Principal amount ☐ Principal with Interest Amount

*Default option will be autorepayment on maturity if no selection is made

FDR Despatch Mode (Tick only One): ☐ E-Receipt ☐ Physical Receipt ☐ Registered Post ☐ Courier ☐ Hand Delivery

All (*) Fields are Mandatory

Rates w.e.f. 25th April, 2024.FIRST APPLICANT: (in Capital Letters) ☐ Mr ☐ Ms ☐ Mrs ☐ MasterApplicant Name: Gender: ☐ Male ☐ Female ☐ Transgender Marital Status: ☐ Married ☐ Unmarried ☐ Other DOB/ Age: Father's Name: Mother's Name: Spouse Name: Guardian's Name: Pan No.: KYC Number (Central KYC Registry) Minor Pan(If Applicable): Nationality: Country of Birth: City of Birth: Occupation: ☐ Business ☐ Professional ☐ Self Employed ☐ Retired ☐ Housewife ☐ Student ☐ Public Sector ☐ Private Sector☐ Govt. Sector ☐ Agriculture ☐ Proprietorship ☐ Others Address Type: ☐ Residential ☐ Business ☐ Registered Office

Permanent Address / Tax Residency Address of Sole/First Applicant: (Refer to Clause 2 of Terms & Conditions)

City State Country Pin Address Type: ☐ Residential ☐ Business ☐ Registered Office

Mailing Address of First Applicant: (Refer to Clause 2 of Terms & Conditions)

City State Country Pin Tel. Mobile: Email:

Tax Residence details as applicable: (MANDATORY)

(Please indicate ALL the Countries in which you are a resident for tax purposes and associated Tax ID number below)

Country (ies) Tax Residency# Tax Identification Number# Identification Type (TIN or Other%, please Specify)

If to also include USA, where the individual is a citizen/green card holder of USA.

% In case Tax Identification Number is not available, kindly provide functional equivalent:

Status: ☐ Domestic Company ☐ Resident individual ☐ HUF ☐ Trust ☐ NRI ☐ Others: Category: ☐ Public ☐ Senior Citizen ☐ Director/Relative of a Director ☐ Shareholder (DP/Client) ID: ☐ Politically Exposed Person (PEP) ☐ Relative of PEP ☐ Employee/Retiree ☐ Employer's Relative (Relation with Employee is:) ☐ Retired EmployeesAnnual Income: ☐ Up to ₹5,00,000 ☐ ₹5,00,001 to ₹10,00,000 ☐ ₹10,00,001 to ₹25,00,000 ☐ ₹25,00,001 to ₹50,00,000 ☐ ₹50,00,001 to ₹1,00,00,000 ☐ ₹1,00,00,001 & above☐ Please recover Income Tax as applicable and issue me TDS Certificate/s as applicable for each financial year. ☐ Form 15H/ 15G is enclosed. Therefore, do not deduct Income Tax.

Bank Details of the Sole / First Applicant for Repayment (Please attach a copy of your Bank's Personalised cheque for verification)

Name of Bank: Branch: Account Number: MICR Code: NEFT IFSC Code:

Amount of Deposit

*Rs. *Rs. (in words)

*Mode of Payment

Cheque / Demand Draft No: Dated: Renewal Of FDR: Drawn on Bank: Branch: Name of Account Holder: Bank Account Details:

Mahindra & Mahindra Financial Services Ltd. - Acknowledgement Slip (Collection Bank)

Received with thanks from Mr/Mrs/Ms dated drawn on Bank branch
as Fixed Deposit under Cumulative / Non-Cumulative Scheme for a period of month(s).Following Documents Received (Self Attested)
☐ Aadhaar Card ☐ Passport ☐ Pan Card ☐ Driving License ☐ Voter ID ☐ Job Card issued by NREGSA duly signed by an officer of the State Government (on behalf of Mahindra & Mahindra Financial Services Ltd.)
☐ Personalised Cancelled cheque ☐ Form 15G ☐ Form 15H ☐ Birth Certificate in case of Minor

Collection Bank

(Valid subject to realisation of cheque / demand draft)

| SECOND APPLICANT: (In Capital Letters) | | | | | | | | | | | | | | | | | | |
|---|----------------------------|---|--|--|--|--|--|--|--|------------------------------|----------------------------|---|--|--|--|--|--|--|
| Mr <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/> Master <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| *Applicant Name: | | | | | | | | | | | | | | | | | | |
| Gender: Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender <input type="checkbox"/> Marital Status: Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Other <input type="checkbox"/> *DOB/ Age | | | | | | | | | | | | | | | | | | |
| *Father's Name: | | | | | | | | | | | | | | | | | | |
| Mother's Name: | | | | | | | | | | | | | | | | | | |
| Spouse Name: | | | | | | | | | | | | | | | | | | |
| Guardian's Name: | | | | | | | | | | | | | | | | | | |
| *Pan No.: CKYC Number (Central KYC Registry): | | | | | | | | | | | | | | | | | | |
| Minor Pan(If Applicable): | | | | | | | | | | | | | | | | | | |
| *Nationality: *Country of Birth *City of Birth | | | | | | | | | | | | | | | | | | |
| Occupation: Business <input type="checkbox"/> Professional <input type="checkbox"/> Self Employed <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Public Sector <input type="checkbox"/> Private Sector <input type="checkbox"/> Govt. Sector <input type="checkbox"/> Agriculture <input type="checkbox"/> Proprietorship <input type="checkbox"/> Others <input type="checkbox"/> SPECIFY | | | | | | | | | | | | | | | | | | |
| *Address Type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| *Permanent Address / Tax Residency Address of Second Applicant: (Refer to Clause 2 of Terms & Conditions) | | | | | | | | | | | | | | | | | | |
| City State Country Pin | | | | | | | | | | | | | | | | | | |
| *Address Type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| *Mailing Address of Second Applicant: (Refer to Clause 2 of Terms & Conditions) | | | | | | | | | | | | | | | | | | |
| City State Country Pin | | | | | | | | | | | | | | | | | | |
| Tel Mobile Email | | | | | | | | | | | | | | | | | | |
| Tax Residence details as applicable: (MANDATORY) (Please indicate ALL the Countries in which you are a resident for tax purposes and associated Tax ID number below) | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Country (ies) Tax Residency#</th> <th>Tax Identification Number%</th> <th>Identification Type (TIN or Other%, please Specify)</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> | | | | | | | | | | Country (ies) Tax Residency# | Tax Identification Number% | Identification Type (TIN or Other%, please Specify) | | | | | | |
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| #To also include USA, where the individual is a citizen/green card holder of USA. % In case Tax Identification Number is not available, kindly provide functional equivalent | | | | | | | | | | | | | | | | | | |
| THIRD APPLICANT: (In Capital Letters) | | | | | | | | | | | | | | | | | | |
| Mr <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/> Master <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Applicant Name: | | | | | | | | | | | | | | | | | | |
| Gender: Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender <input type="checkbox"/> Marital Status: Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Other <input type="checkbox"/> DOB/ Age | | | | | | | | | | | | | | | | | | |
| Father's Name: | | | | | | | | | | | | | | | | | | |
| Mother's Name: | | | | | | | | | | | | | | | | | | |
| Spouse Name: | | | | | | | | | | | | | | | | | | |
| Guardian's Name: | | | | | | | | | | | | | | | | | | |
| *Pan No.: CKYC Number (Central KYC Registry): | | | | | | | | | | | | | | | | | | |
| Minor Pan(If Applicable): | | | | | | | | | | | | | | | | | | |
| *Nationality: *Country of Birth *City of Birth | | | | | | | | | | | | | | | | | | |
| Occupation: Business <input type="checkbox"/> Professional <input type="checkbox"/> Self Employed <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Public Sector <input type="checkbox"/> Private Sector <input type="checkbox"/> Govt. Sector <input type="checkbox"/> Agriculture <input type="checkbox"/> Proprietorship <input type="checkbox"/> Others <input type="checkbox"/> SPECIFY | | | | | | | | | | | | | | | | | | |
| Address Type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| *Permanent Address / Tax Residency Address of Third Applicant: (Refer to Clause 2 of Terms & Conditions) | | | | | | | | | | | | | | | | | | |
| City State Country Pin | | | | | | | | | | | | | | | | | | |
| Address Type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Mailing Address of Third Applicant : (Refer to Clause 2 of Terms & Conditions) | | | | | | | | | | | | | | | | | | |
| City State Country Pin | | | | | | | | | | | | | | | | | | |
| Tel Mobile Email | | | | | | | | | | | | | | | | | | |
| Tax Residence details as applicable: (MANDATORY) (Please indicate ALL the Countries in which you are a resident for tax purposes and associated Tax ID number below) | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Country (ies) Tax Residency#</th> <th>Tax Identification Number%</th> <th>Identification Type (TIN or Other%, please Specify)</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> | | | | | | | | | | Country (ies) Tax Residency# | Tax Identification Number% | Identification Type (TIN or Other%, please Specify) | | | | | | |
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| #To also include USA, where the individual is a citizen/green card holder of USA. % In case Tax Identification Number is not available, kindly provide functional equivalent | | | | | | | | | | | | | | | | | | |
| IDENTIFICATION OF DEPOSITORS (Refer Terms & Condition): To Comply with "Know your Customer" Guidelines for NBFCs prescribed by the Reserve Bank of India, new investors should provide self attested copy of any one of the following documents (which contains the photograph of the concerned first depositor) for identification & proof of residential address <input type="checkbox"/> Passport (Supply Date:) <input type="checkbox"/> PAN Card with address proof <input type="checkbox"/> Voter Identity Card <input type="checkbox"/> Driving Licence <input type="checkbox"/> Aadhaar Card In case, KYC Document address differs from mailing address please furnish: <input type="checkbox"/> Telephone Bill <input type="checkbox"/> Letter from any recognised public authority <input type="checkbox"/> Bank Account statement <input type="checkbox"/> Electricity Bill <input type="checkbox"/> Letter from employer | | | | | | | | | | | | | | | | | | |

Nomination

I / we above named depositor/s ☐ do not wish to nominate / ☐ wish to nominate following person to whom in the event of my / our / minor's death the amount of this deposit may be returned by Mahindra & Mahindra Financial Services Limited.

| | |
|---|---------------|
| *Name of the Nominee Mr. / Ms. / Mrs. | Date of Birth |
| *Relation of Nominee with 1st Depositor | |
| Guardian's Name Mr. / Ms. / Mrs. (if Nominee is Minor) | |
| Address of Nominee | |
| City | State |
| Country | Pin |
| Tel | *Email |
| | *Mobile |

Depositors are strongly advised to have their accounts in joint names or use nomination.

1st Applicant Signature - _____ 2nd Applicant Signature - _____ 3rd Applicant Signature - _____

Witness 1 Signature - _____ Witness 2 Signature - _____

I/We have read and understood the nomination rules prescribed by Reserve Bank of India and the Procedure terms and conditions laid down by the Company governing the nomination facility and accept that they are binding on me/us

I. CHANGE / CANCELLATION OF NOMINATION

Depositor(s) can change / cancel the nomination at any point of time by filling with the company the prescribed form. The prescribed form is available on the Company's website.

II. CHANGE / CANCELLATION / ADDITION OF HOLDER(S)

Depositor(s) are allowed to change/cancel/add the joint holder(s) only at the time of renewal. In case of the death of the holder(s), second/third (if any) the holding is cancelled automatically on submission of the certified copy of death certificate.

II. TRANSMISSION PROCEDURES

Deposit(s) cannot be transmitted in favour of nominee, the default option is preclosure in case of death of the holder(s).

For Transmission of deposit(s), the joint holder(s) should submit the following.

- i) Deposit Receipt(s), duly discharged by all the holders with revenue stamp (ii) Certified copy of Death Certificate of the deceased holder(s) (iii) Any documentary evidence that may be called for by the company at that time.
- ii) Transfer of deposit(s) in favour of holder(s) shall be a valid discharge by the company against the legal heirs.
- iii) Deposit(s) that is/are preclosed/transmitted in favour of holder(s) nominee who is a Non-Resident will be only on Non-Repatriable basis. (i.e. neither the principal nor the interest thereon will be repatriable).

*FOR NRI DEPOSITORS ONLY

- ☐ a) I/We hereby declare that the amount deposited with Mahindra and Mahindra Financial Services Ltd. represents amounts transferred from NRO Account. Further this amount does not represent inward remittance from Overseas to NRO account or transfer of funds from NRE/FCNR (B) accounts to NRO account"
- ☐ b) I/We hereby declare that my stay in India during the financial year _____ does not exceed/will not exceed 182 days & hence I will be a non-resident during the said financial year.

Note: NRI's & PIO's Deposits will be accepted for a maximum period of 3 years.

FATCA DECLARATION:-

Certification I/We have understood the information requirements of the Form as per the CDDT notified Rules 114F to 114H and hereby confirm that the information provided by me/us on this form is true correct and complete. I/We also confirm that I/We have read understood the Terms and Conditions below and hereby accept the same. I/We understand that my personal details as provided / available in the records of Mahindra & Mahindra Financial Services Limited ('the Company') will be used for CDDT reporting (Please refer FATCA terms & conditions for more details)

I/We hereby expressly consent to MMFSL to search, download, Upload/Share with Central KYC registry & receive information through SMS/e-mail on the above registered mobile number/e-mail id for the purpose of KYC compliance.

I/We hereby provide our consent to MMFSL to obtain and/or submit my / our information from/to Credit Information Company and/or information utility and/ or such institution set up under the provisions of law from time to time, as and when required.

I/We hereby expressly consent and authorize MMFSL to make telephone calls, send SMSs, WhatsApp messaging & services, Emails, USSD, Voice services, Push Notifications, Cell Broadcast, MMS, Location-based Services, and to enable mobile Solutions to inform/benefit me on any given options.

Vernacular Declaration:-

I/We confirm that the terms and conditions are explained by _____ (Advisor) in _____ language, I have understood and agree to the terms and conditions mentioned on AOF:-

DECLARATION: I/We hereby declare that the amount being deposited herewith is not out of any funds acquired by me/us by borrowing or accepting from any other person. I/We declare that the first named depositor is the beneficial owner of this joint deposit & is to be treated as the payee for the purpose of deduction of Tax under section 194A of the Income Tax, 1961. I/We have read the Terms & conditions of Deposits & agree to abide by them. I/We have gone through the financial & other declarations furnished by the Company & after careful consideration I am/We are making the deposit with the Company at my/our own risk & volition. I/We further declare that, I/We are/are authorized to make this Deposit in the above mentioned Scheme & that the amount kept in the Deposit is through legitimate source & does not involve directly or indirectly any proceeds of Schedule of offence &/or is not designed for the purpose of any contravention or evasion of the provisions of the Prevention of Money Laundering Act, 2002 & any Rules, Regulations, Notifications, Guidelines or Directions thereunder, as amended from time to time. I/We shall provide any further information & fully co-operate in any investigation as & when required by the Company in accordance with the applicable Law. I/We further affirm that the information/details provided by me/us is/are true & correct in all respect & nothing has been concealed.

Date & Place:

NRI & PIO
(Signature)
(DO NOT STAPLE)

NRI & PIO
(Signature)
(DO NOT STAPLE)

NRI & PIO
(Signature)
(DO NOT STAPLE)

**Thumb impressions must be attested by Magistrate or Notary Public or Special Executive Officer.

Signature

Designation / Authority

*1st Applicant Signature
(Guardian in case of Minor)

*2nd Applicant Signature

*3rd Applicant Signature