



APPLICATION FORM FOR 7.75% SAVINGS (TAXABLE) BONDS, 2018

(Put ✓ wherever required, Field with '*' are mandatory)

BARCODE

Revised Form A (Notified on January 03, 2018.)
Non Cumulative

| | | | |
|------------------------|--|--------------------|------------------------|
| Lead Generator Sol ID | | Name of the Bank | A X I S B A N K L T D. |
| Lead Generator EMP. ID | | Name of the Branch | |
| | | Application Number | |

FOR OFFICE USE ONLY

| Broker's Name & Code | Sub-broker's Name & Code | Bank Branch Stamp | Branch Name & Code | BLA Number | Verified By |
|--|--|--|---|----------------------------|-------------|
| | | | | | |
| Date of transfer to Link Cell (DD / MM / YYYY) | Date of Credit to Special Current A/c (DD / MM / YYYY) | Date of Credit to Govt. A/c (DD / MM / YYYY) | Date of Receipt of Application (DD / MM / YYYY) | Full Address of the Branch | |
| | | | | | |

APPLICANT(S) NAME(S) [IN BLOCK LETTERS]

| | | | | |
|---|-----------|------------|-------------|--|
| 1 st Applicant: Mr./Mrs./Ms. | | | | |
| | Last Name | First Name | Middle Name | |
| 2 nd Applicant: Mr./Mrs./Ms. | | | | |
| | Last Name | First Name | Middle Name | |
| 3 rd Applicant: Mr./Mrs./Ms. | | | | |
| | Last Name | First Name | Middle Name | |
| Guardian : Mr./Mrs./Ms. | | | | |
| | Last Name | First Name | Middle Name | |

Guardian's relationship with minor Father Mother Legal Guardian

| | | | |
|---|-------------|-------------|--|
| *Date of Birth: 1 st Applicant (DD / MM / YYYY) ___/___/___ | Gender: M/F | Aadhaar No. | |
| *Date of Birth: 2 nd Applicant (DD / MM / YYYY) ___/___/___ | Gender: M/F | Aadhaar No. | |
| *Date of Birth: 3 rd Applicant (DD / MM / YYYY) ___/___/___ | Gender: M/F | Aadhaar No. | |

| | | | | |
|----------------------|-----------|------------|-------------|--|
| Mother's Maiden Name | | | | |
| | Last Name | First Name | Middle Name | |

COMMUNICATION ADDRESS OF THE APPLICANT

| | |
|--------------------------------|--------|
| | |
| | |
| Telephone (office / residence) | Mobile |
| E-mail Address | |

STATUS

- Resident Individual HUF
 On behalf of minor Power of Attorney Holder

INVESTMENT DETAILS

Open a new Bond Ledger Account
 Credit to my Bond Ledger Account No. _____

MODE OF HOLDING

- Single Joint Anyone or Survivor Legal Guardian

MODE OF INVESTMENT

Cash Cheque / DD Electronic credit

Cheque / DD No. _____ dated ____/____/____ drawn on (Bank / Branch) _____
 (DD / MM / YYYY)

for (Amount) ₹ _____ (Rupees _____ Only)

***Bank details of First Applicant:** (Please provide the following details for Interest / Redemption payment)

Interest Payment Option: Directly credit interest amount to my Bank Account No.

Particulars of the Bank Account : Bank Name _____ Branch _____

| | |
|---|----------------------|
| Account Number | <input type="text"/> |
| Nine-digit Code Number of the Bank & Branch appearing on the MICR cheque issued by the Bank | <input type="text"/> |
| IFSC Code | <input type="text"/> |

SIGNATURE AND PAN NUMBER

| | Signature / Thumb Impression@ | PAN Number | I.T. Circle / Ward / District | Bank A/c No. and Branch | MICR CODE & IFSC CODE |
|----------------------------|-------------------------------|------------|-------------------------------|-------------------------|-----------------------|
| 1 st Applicant* | | | | | |
| 2 nd Applicant | | | | | |
| 3 rd Applicant | | | | | |

@Thumb Impression to be attested by two witnesses on the back side

*All fields mandatory.

Witnesses:

Name of 1st Witness _____

Address _____

Name of 2nd Witness _____

Address _____

Signature _____

Signature _____

NECS / NEFT Mandate Form

(For credit of redemption amount / interest to Bank Account not held with Bank having the Bond Ledger Account)

1. Name of the First Applicant

| | | | |
|---|-----------|------------|-------------|
| 1 st Applicant: Mr./Mrs./Ms. | | | |
| | Last Name | First Name | Middle Name |

2. Particulars of the Bank Account: Bank Name _____ Branch _____

| | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|
| Nine-digit Code Number of the Bank & Branch appearing on the MICR Cheque issued by the Bank | | | | | | | | | | | |
| IFSC Code | | | | | | | | | | | |

(Please attach a photocopy of the cheque leaf or a cancelled cheque issued to you by the Bank for verification of the Code Number)

3. Account Type S. B. Account Current Account

| | |
|------------------|--|
| Account Number | |
| Ledger Number | |
| Ledger Folio No. | |

I, hereby authorize _____ (name of the Bank) to credit my interest/redemption amounts through NECS/NEFT
 I, hereby declare that the particulars given above are correct and complete. If the transaction is delayed at all for reasons of incomplete or incorrect information, I would not hold the user institution responsible. I, hereby agree to discharge the responsibility expected of me as a participant under the scheme.

Place _____ Date _____ (Signature of the Applicant) _____

Bank Certification (Not required if photocopy of the cheque is submitted)

 Certified that the particulars furnished above are correct as per our records.

(Date, Bank Stamp & Signature of Authorised Official)

H.U.F. Declaration Form

(Mandatory, if applicant is Karta of HUF)

I, _____, residing at the address given against First Applicant, do solemnly affirm that I am the Karta of the Hindu Undivided Family and as such have full powers to sell, endorse, transfer or otherwise deal in the 7.75% Savings (Taxable) Bonds, 2018 standing in the name of the HUF.

Specimen Signature for and on behalf of the HUF (name of the HUF) _____

Place _____ Date _____

(Signature of the Karta with seal of HUF)

Nomination Facility (Optional)

I/We, _____

(Name/s and Address/es)

The holder of bond ledger accounts no: @ _____

Nominate the following person/s who shall on my/ our death have the right to the bond / receive payment of the amount for the time being due on the bond specified below:

| | | | Particulars of nominee/s | | | |
|---------------|----------|-------------------|---|---------------|-------------------------|-----------------------------|
| Date of issue | Amount ₹ | Date of repayment | Full name with expanded initials and address of nominee | Date of birth | Relation-ship to holder | Particulars of bank account |
| | | | | | | |

\$As _____ the sole nominee above is a minor on this date, I/ We appoint Shri / Smt. / Kum _____ to receive the amount for the time being due on the above bond in the event of my death during the minority of the said nominee

\$\$ _____

+ the nomination is in substitution of the nomination dated _____ Made by me/us and registered on your books at _____ which shall stand cancelled on registration of this nomination.

@ to be filled in by the bank opening the account

(SIGNATURE / THUMB IMPRESSION OF HOLDER/S)

PLACE: _____

DATE: _____

Witnesses:

Name of 1st Witness _____

Address _____

Name of 2nd Witness _____

Address _____

Signature _____

Signature _____

Place: _____

Date: _____

\$ to be filled in, if nominee is a minor

\$\$ name of nominee (minor)

+ the para may be deleted, if the nomination is not in substitution of the one already made.

INFORMATION FOR INVESTORS IN 7.75% SAVINGS (TAXABLE) BONDS, 2018

Government of India had introduced 7.75% Savings (Taxable) Bonds, 2018 vide their notification No. F.4 (28)-W&M/2017 dated January 03, 2018. The main features of the Scheme are as under:-

| Item | 7.75% Savings (Taxable) Bonds, 2018 | Remarks |
|---------------------------|---|---|
| 1) Category of Investor | Individual HUF | Non Resident Indians (NRI)s are not eligible to invest in these bonds |
| 2) Limit of investment | Minimum ₹1000/- and in multiples of ₹1000/- | No maximum limit |
| 3) Date of Issue of bonds | Date of receipt of subscription in cash or date of realization of cheque/draft/ electronic credit | |
| 4) Forms of Bonds | Demat form held in the Bond Ledger Account | Bond Ledger Account will be opened by Receiving Office in the name of investor/s. |
| 5) Option | Non-cumulative / Cumulative | Change of option is not permitted. |
| 6) Interest | In case of non-cumulative option, interest is payable on half yearly basis. In case of Cumulative option, interest is payable at the time of maturity | Half-yearly interest is payable on 1st February / 1st August |
| 7) Post Maturity Interest | Post Maturity Interest is not payable. | |
| 8) Bank Account | It is mandatory for the investor/s to provide bank account details to facilitate payment of interest /maturity value directly to his/her/their bank account. | |
| 9) Tax Benefits | Income from the bonds is taxable. | Tax will be deducted at source while interest is paid |
| 10) Nomination Facility | The sole Holder or all the joint holders may nominate one or more persons as nominee. | |
| 11) Maturity Period | After 7 years | |
| 12) Premature Redemption | Facility is available to the eligible investors after Lock in period of 4, 5, and 6 years in the age bracket of 80 years and above, between 70 to 80 years and 60 to 70 years respectively. | |
| 13) Transferability | The bonds are not tradable in the secondary market. | |
| 14) Application Forms | Available at designated branches of SBI, 18 Nationalised banks, 3 Private Sector Banks and Stock Holding Corporation of India Ltd. | |

DUTIES OF INVESTOR / APPLICANTS

- A) Please complete the application in all respects
- B) Incomplete applications are liable to result in delay of issue of the bonds (at the cost of the applicant)
- C) In case the application is submitted by a Power of Attorney (POA) holder, please submit original POA for verification, along with an attested copy for record.
- D) In case the application is on behalf of a minor, please submit the original birth certificate from the School or Municipal Authorities for verification, together with an attested copy for record
- E) Please note that nomination facility is available to a Sole Holder or all the joint holders (investors) of a Savings bond.
- F) In case nominee is a minor, please indicate the date of birth of the minor and a guardian can be appointed
- G) Nomination facility is not available in case the investment is in the name of a minor
- H) Please fill separate application form (different colours) for issue of CUMULATIVE / NON-CUMULATIVE bonds.
- I) Please notify the change of address to Receiving Office immediately
- J) POST MATURITY INTEREST IS NOT PAYABLE ON THESE BONDS. HENCE PLEASE OBTAIN REDEMPTION PROCEEDS ON THE DUE DATE
- K) Indicate your date of birth / age.
- L) Provide your bank account details for receiving payment through electronic mode
- M) Any information regarding tax applicability may be provided to the bank/branch

Rights of the Investors

- a) The Bond will be issued on the same day if subscription is received in cash and on realization of the cheque/DD/electronic credit if subscription is received through cheque/DD/electronic credit.
- b) The Certificate of Holding will be issued within 5 days from the date of tender of application.
- c) The interest on the bond accrues from the date of receipt of subscription in cash or date of realization of cheque/DD/electronic credit. The interest will be credited to the bank account of the holder directly provided by him/her in the application form.
- d) The interest on the date of 1st February / 1st August with last instalment on date of redemption.
- e) An advice of payment of interest will be issued to the investor one month in advance from the due date.
- f) Maturity intimation advice will be issued one month before the due date of the bond.
- g) Facility for payment of interest and principal by 'demand draft free of cost or at par cheques' for up country customers is available.
- h) The facility of intra-bank and inter-bank branch transfer of the bonds is available.
- l) Application forms for investments, redemption, NECS/NEFT Mandate, etc, in respect of Savings Bonds are available on the website at www.....com (Banks and SHCIL website).
- j) A sole holder or all the joint holders may nominate one or more nominees to the rights of the bonds.
- k) The nomination will be registered at the Office of Issue and a Certificate of Registration will be issued to the holder.
- l) The nomination can be varied by registering a fresh nomination.
- m) The existing nomination can be cancelled by a request to the Office of Issue.
- n) The redemption is due on expiry of seven years from the date of investment.
- o) Premature redemption facility has been allowed with certain conditions.
- p) The investor is entitled to receive repayment amount within five clear working days from the date of tender of acquaintance.
- q) To avoid delay in receipt of interest / redemption proceeds applicants may indicate his choice, for availing of half yearly interest / redemption proceeds through ECS/NEFT/RTGS or direct credit to the bank account.
- r) Investors are entitled for compensation for delayed payments at the rate decided by RBI vide their circulars issued from time to time.

In case the bank does not comply with the above, you may lodge a complaint in writing in the form provided at the counter and address the same to the nearest office of Reserve Bank of India as under:

THE REGIONAL DIRECTOR,
RESERVE BANK OF INDIA,
CUSTOMER SERVICE DEPARTMENT/
BANKING OMBUDSMAN
(LOCATION)

YOU MAY ALSO ADDRESS YOUR COMPLAINT TO:

THE CHIEF GENERAL MANAGER
RESERVE BANK OF INDIA
INTERNAL DEBT MANAGEMENT DEPARTMENT
CENTRAL OFFICE
SBS MARG, FORT
MUMBAI- 400 001

Disclaimer :- I have read and understood the details of information for the investors as well as rights and duties of investors. The agent/bank has explained the features of the scheme to me.

Signature of the applicant

..... **TEAR AWAY HERE**

Acknowledgment of Application Form

Application No.

Bank/Branch _____

date ___ / ___ / ___

Received from Mr. / Mrs. / Ms. _____ Cash / Draft / Pay Order / Cheque No. _____
dated ___ / ___ / ___ drawn on (Bank and branch) _____ for
₹ _____ (Rupees _____ only) for the purchase of 7.75% Savings (Taxable) Bonds, 2018 for a period of
7 years, interest payable on cumulative[]/payable on Non-cumulative [] basis of the nominal value of ₹ _____ (Rupees _____
only).

Date, Bank Stamp & Signature of the authorised
official of the Bank