



Shriram Finance Limited

Corporate Identity No. (CIN) L65191TN1979PLC007874

Regd. Office: Sri Towers, Plot No. 14A, South Phase, Industrial Estate, Guindy, Chennai - 600 032. Ph: 044 485 24 666

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Toll free No. 18001034959, E-mail ID: customersupport@shriramfinance.in, www.shriramfinance.in



SHIRIRAM UNNATI

FIXED DEPOSITS

**PARTNERSHIP FIRMS, TRUSTS,
SOLE PROPRIETORSHIP, HUF,
INSTITUTIONS & CORPORATE**

Deposits do not qualify as eligible investment
for charitable Institutions registered under section
12A of the Income Tax Act.



Application for Deposit

ICRA rating indicates high degree of safety

India Ratings and Research rating indicates high degree of safety



INTEREST RATES ON FRESH DEPOSITS/RENEWALS UPTO Rs. 10 CRORE (w.e.f. 05th August 2025)*@

Period (In months)	Cumulative	Non-Cumulative			
	At Maturity % p.a.	Monthly % p.a.	Quarterly % p.a.	Half yearly % p.a.	Yearly % p.a.
12	7.00	6.79	6.82	6.88	7.00
18-23	7.15	6.93	6.97	7.03	7.15
24-35	7.25	7.02	7.06	7.12	7.25
36-60	7.60	7.35	7.39	7.46	7.60

*Interest rates are rounded off to two decimal places.

@ Additional interest rate of 0.15% p.a. will be paid on all renewals, where the deposit is matured.

The above additional interest rates will be applied on the yearly rate, which will be factored correspondingly into the calculation of compounding interest rates for periods shorter than a year, including monthly, quarterly, and half-yearly rates.

**INTEREST RATES ARE SUBJECT TO CHANGE AND THE RATE APPLICABLE WILL BE
THE RATE PREVALENT ON THE DATE OF DEPOSIT / RENEWAL.**

TERMS AND CONDITIONS GOVERNING ACCEPTANCE OF DEPOSITS

1) MINIMUM DEPOSIT:

Deposits will be accepted in multiples of Rs. 1,000/- subject to a minimum amount of Rs. 5,000/-

2) SCHEME AND TENURE:

Company accepts cumulative and non-cumulative deposits for different tenures as mentioned on the first page of the application form.

3) INTEREST:

Interest is paid for the entire period of deposit. Interest will be computed on the deposit from (i) the date of receipt of funds by the company in case of payment made by online remittance such as National Electronic Fund Transfer (NEFT) / Real Time Gross Settlement (RTGS) / MPS / Net banking / Payment gateway / Payment aggregator / any other online mode, (ii) the date of realisation of the amount by the company in case of payment made by cheque / demand draft / any other mode.

Interest will be computed on the effective date of deposit until the end of the calendar quarter. Interest for the subsequent calendar quarter would be computed on the accumulated balance (principal and interest) (net of TDS, if any) until the next calendar quarter or maturity date whichever is earlier. Interest is compounded at monthly rate for Cumulative deposit and Non-Cumulative deposit where interest pay-out is Quarterly/Half-Yearly/Yearly, Interest on TDS, if any will be credited to the deposit holder on the last day of the calendar quarter.

If the Deposit is made / processed within a period of one month prior to the interest payout date, the interest for the period will be paid on the next interest payout date without any deferment interest for the booked period.

Interest payable for Non-Cumulative Deposit will be made only through National Electronic Fund transfer (NEFT) as per the below given schedule.

Non-cumulative- Monthly	Last day of every month
Non-Cumulative- Quarterly	Last day of March/June/September/December
Non-Cumulative- Half Yearly	Last day of March and September
Non-Cumulative-Yearly	Last day of March

4) IDENTIFICATION OF DEPOSITORS:

To comply with 'Know Your Customer' guidelines for NBFCs prescribed by the Reserve Bank of India, applicant(s) should provide a self-attested copy of ID proof and Address proof. Any one of the following KYC documents which contains the photograph of the concerned depositor(s) can be submitted for identification and proof of residential address.

KYC documents for individual, Karta, Trustee, Proprietor, Authorized Signatory, Beneficial Owners, Power of Attorney Holders

- a) Permanent Photo
- b) Permanent Account Number(PAN) mandatory or Form No. 60 (transaction amounts <= Rs.49,999/-)
- c) ID & Address Proof (if KYC number is available, then same is not required provided name and address is matching between KYC portal and as per application form)

Officially Valid documents(OVD)

- a) Passport
- b) Driving License
- c) Voter ID
- d) Job card issued by NREGA duly signed by an officer of the State Government
- e) Aadhaar Card
- f) Letter from the National Population Register containing details of name and address

If above mentioned OVD does not have current address mentioned on application form then any of the below listed documents to be treated as deemed OVD for limited purpose of proof of address. If customer submits deemed OVD then within 3 months from the date of submitting below documents, customer needs to submit above OVD with current address.

- a) Utility bill in the name of customer, which is not more than two months of any service provider (electricity, Telephone, post-paid mobile phone, Piped gas, Water, etc.).
- b) Property or Municipal Tax receipt
- c) Proof of Income or Payment Order/POB issued to employed persons by Government departments or Public Sector undertakings. If they contain the address

Letter of engagement of accommodation from employer issued by State Government Departments, Statutory or Regulatory Bodies, Public Sector Undertakings, Scheduled Commercial Banks, Financial Institutions and Listed Companies, and Lease & License agreements with such employers allowing official accommodation.

Additional documents for INDIVIDUAL

- a) Personalised cancelled cheque leaf. In case of minor—cheque leaf should be of minor.
- b) Proof of address of minor or Form No. 60 (transaction amount <= Rs.49,999/-)
- c) Date of Birth Proof.
- d) Form 15 G/H (Tax not to be deducted)
- e) Email ID mandatory for E-Receipt.
- f) Application form duly filled and signed in case of other deposits opened through digital mode. In case of minor, it should be signed by guardian.

Additional documents for an account of INDO-UNIONED FAMILY/HUF

- a) Copy of HUF PAN
- b) Personalised cancelled cheque leaf in the name of HUF
- c) Declaration with Karta and signature along with signatures of all co-owners
- d) Application form duly filled and signed with HUF seal.
- e) Letter of engagement of accommodation from employer issued by State Government Departments, Statutory or Regulatory Bodies, Public Sector Undertakings, Scheduled Commercial Banks, Financial Institutions and Listed Companies, and Lease & License agreements with such employers allowing official accommodation.

Additional KYC documents for an account of SOLE PROPRIETORSHIP CONCERN

- a) Personalised cancelled cheque leaf in the name of Sole proprietorship concern
- b) Application form duly filled and signed with sole proprietorship concern as a proof of business/activity
- c) Application for registration of sole proprietorship concern as a proof of business/activity
 - Registration certificate/ Upan registration certificate(URC) issued by the Government
 - Certificate License issued by the Municipal Authorities under Shop & Establishment Act
 - Income tax return (Not just acknowledgement) /GST returns
 - CST/ VAT/ GST certificate—Complete set of documents to be submitted
 - Import Exporter Code (IEC) issued by the office of DGFT/Licence/certificate of Practice issued in the name of the Proprietorship concern by any Professional Body incorporated under a statute.
 - Utility bill such as electricity, water and landline/ mobile phone bills in the name of proprietorship concern.

Additional KYC documents for an account of PARTNERSHIP FIRM

- a) Registration certificate
- b) Partnership Deed
- c) PAN Copy of Firm—Self Attested with Seal and Signature
- d) Proof of address of Firm—Principal place of business to be self attested with Seal and Signature, if it is different from Partnership deed.

Additional KYC documents for an account of LIMITED LIABILITY PARTNERSHIP FIRM

- a) Limited Liability Partnership (LLP) Agreement
- b) Certificate of incorporation
- c) PAN Copy of Firm—Self Attested with Seal and Signature
- d) Proof of address of Firm—Principal place of business to be self attested with Seal and Signature

Additional KYC documents for an account of CORPORATES

- a) Certificate of incorporation(COC)
- b) Memorandum and Articles of Association (MOA & AOA)
- c) Proof of address of Firm—Principal place of business to be self attested with Seal and Signature
- d) List of Directors/ Name of Director/ Name of Secretary
- e) PAN Copy of Company stated with Seal and Signature
- f) Proof of address in the name of Company
- g) Personalised cancelled cheque leaf in the name of Company and with seal
- h) Beneficial Ownership Declaration signed by two Directors or Company Secretary or Authorized signatories as per mode of operation
- i) Application for registration of firm with seal and signature

Additional KYC documents for an account of UNLIMITED LIABILITY PARTNERSHIP FIRM

- a) Limited Liability Partnership(LLP) Agreement
- b) Certificate of incorporation
- c) PAN Copy of Firm—Self Attested with Seal and Signature
- d) Proof of address of Firm—Principal place of business to be self attested with Seal and Signature

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Additional KYC documents for an account of UNLIMITED LIABILITY PARTNERSHIP FIRM

- a) Limited Liability Partnership (LLP) Agreement
- b) Certificate of incorporation
- c) PAN Copy of Firm—Self Attested with Seal and Signature
- d) Proof of address of Firm—Principal place of business to be self attested with Seal and Signature

Additional KYC documents for an account of SOLE PROPRIETORSHIP CONCERN

- a) Personalised cancelled cheque leaf in the name of Sole proprietorship concern
- b) Application for registration of sole proprietorship concern as a proof of business/activity
- c) Application for registration of sole proprietorship concern as a proof of business/activity
 - Registration certificate/ Upan registration certificate(URC) issued by the Government
 - Certificate License issued by the Municipal Authorities under Shop & Establishment Act
 - Income tax return (Not just acknowledgement) /GST returns
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 - Import Exporter Code (IEC) issued by the office of DGFT/Licence/certificate of Practice issued in the name of the Proprietorship concern by any Professional Body incorporated under a statute.
 - Utility bill such as electricity, water and landline/ mobile phone bills in the name of proprietorship concern.

Additional KYC documents for an account of UNINCORPORATED ASSOCIATION OR BODY OF INDIVIDUALS

- a) Latest Resolution of Association with names of beneficiaries, trustees, sefier and authors of Trust
- b) Power of attorney granted to its members on the Company letterhead
- c) Power of attorney granted to its members on the Company letterhead
- d) PAN Copy of Association with Seal and Signature
- e) Address proof in the name of association or Body of Individuals.

Additional KYC documents for an account of ARTIFICIAL JURIDICAL PERSONS NOT covered above (societies, universities and local bodies like village panchayats)

- a) Document showing name of the person authorised to act on behalf of the entity.
- b) Copy of ID card granted to the entity.
- c) Copy of PAN

Additional KYC documents for an account of NON-RESIDENT INDIANS(NRI) / PERSON OF INDIAN ORIGIN(PIO)/OVERSEAS CITIZEN OF INDIA(OCI)

- a) Recent Photograph
- b) PAN—Self Attested
- c) Sign personalised cancelled cheque leaf. In case of minor—cheque leaf should be of minor.
- d) Form of proof of minor, if minor
- e) Application form duly filled and signed. In case of minor, it should be signed by guardian.
- f) Passport
- g) Valid Visa / Work / Residence permit / PIO/OCI Card
- h) Overseas / Indian Address proof
- i) Income Tax Return (ITR) for the 12F, of the country of which the investor is resident. Form 10F, PE Certificate, Declaration to avail DTAA/fee if customer wants to avail tax benefit.
- j) Form 10F, PE Certificate, Declaration to avail tax benefit if customer wants to avail tax benefit.

The depositor shall inform the company within 30 days in case any update in the documents submitted earlier.

5) CENTRAL KYC REGISTRY:

Reserve Bank of India has mandated financial institutions to share KYC information to a Central KYC registry (KYCR) who shall allot a unique KYC number. Depositor(s) are requested to share with us such amount upon receipt of the same.

6) INDIVIDUAL AND FAMILY (HUF) DEPOSITS:

Deposits in HUF will be accepted subject to production of necessary documents as required by the Company.

a) Deposits may be made in the joint names of two or three persons under 'First or Survivor's (or S/s) or 'Any one or Survivor's (or A/s)'. All communications will be addressed to the first depositor. All interest payment and repayment of deposits will be made in the name of first depositor.

b) Joint deposit can be made only by individuals. Deposits pertaining to Non-individuals including society, trust, body of individuals, corporate, partnership firm, Karta of Hindu Undivided Family cannot be held.

c) Deposits held jointly by a Resident Indian and a NRI/PIO/D/OCI or vice versa will be held only under First or Survivor basis.

d) NRI/PIO/D/OCI status will be provided only if the first holder is NRI/PIO/OCI.

e) Only first depositor is eligible to avail preferred rate of interest, if any applicable.

f) Non-RESIDENT INDIAN / PERSON OF INDIAN ORIGIN (PIO) / OVERSEAS CITIZEN OF INDIA (OCI) DEPOSITS:

The Company does not accept deposit from Non-Resident Indians/PIO/OCI if the same is deposited through foreign nationals except PIO/OCI.

The application to submit or the documents required to be submitted by the Non-Resident Indians/PIO/OCI depositors are required to mandatorily IFATCA-CRS details. The company may be asked to share information on the Deposit's account with the relevant authorities.

9) NOMINATION:

a) The depositor can nominate the deposit, when deposit is made by more than one person jointly, a jointly nominated person to whom his/her deposit in the Company shall vest in the event of his/her death. Notwithstanding anything contained in any other law, whether in force at the time of deposit or otherwise, whether testamentary or otherwise in respect of such deposit when the depositor has made a nomination in the prescribed manner, power to confer on any person the right to vest in the deposit, the nomination shall be valid on the death of the depositor(s) become entitled to all the rights in the deposit in the Company to the exclusion of all other persons unless the nomination is varied or cancelled in the prescribed manner.

b) Nomination can be made only by individuals. A Power of attorney holder cannot nominate.

c) The nominee shall be a son, daughter, spouse, body of individuals, corporate, partnership firm, Karta of Hindu Undivided Family or a Power of Attorney holder.

d) A minor can be nominated by guardian.

10) INCOME-TAX PROVISIONS:

a) **TDS Deduction:** (i) As required under the Income Tax Act, 1961, tax at applicable rate will be deducted at source from the amount of interest paid and/or credited to a depositor if the gross interest exceeds the prescribed limit during the financial year under specific customer ID. For exemption of TDS, First applicant, must submit the company Tax deduction form (Form 15G/H/Order 197-1987) as the case may be. However, if the deduction is not available, then the company will be liable to pay the tax.

(ii) TDS will be deducted in case of a non-resident depositor if PAN is not furnished. While filing up the address, then the company will be liable to pay the tax.

(iii) If the interest amount is insufficient to recover TDS, the same will be recovered from the principal or deposit.

b) **Furnishing PAN:** If a depositor requires any exemption from tax deduction at source on interest payments a valid deduction in Form 15G/H or as may be prescribed under the Income Tax Act, 1961 needs to be submitted by the company. Any person making a false statement in the declaration shall be liable to prosecution under S.277 of the Income Tax Act, 1961. The Company will not be responsible for such false declaration made by the depositor.

c) **Form 15G/H:** If a form 15G/H is submitted, then the TDS will be deducted in case of a non-resident depositor if PAN is not furnished.

d) **TDS Certificates:** In accordance with the CBST Circular 03/2011 dated 1/05/2011 TDS Certificates in Form No. 16A will be downloaded by the Company from TNV Website if PAN is not furnished. While filing up the address of the applicant in the TDS certificate Form, the Company will be informed that if the address is the same as with NSDL, at the time of PAN application then the TDS certificate will be issued by NSDL. In the event of non-furnishing of PAN address, the Company will be liable to pay the tax.

e) **TDS with respect to NSDL/PDCP deposits:**

- (a) TDS will not be deducted on PDCP for interest of Tax as per the TDS certificate.
- (b) Declaration to Form 15G/H for non deduction of Tax will not be applicable. However, a lower deduction Certificate obtained from the income tax Department, can be furnished for claiming Nil or lower Tax.
- (c) Tax rate will be as per the provisions of Section 15G of the Income Tax Act, 1961.
- (d) Double Tax Avoidance Agreement (DTAA) exists with the country of the investor's resident, then the applicable Tax rate will be that of DTAA or income tax rate. However to claim the benefit of DTAA, the Tax Residency Certificate, Form 10F, No. Permanent Establishment (PE) and Self declaration will have to be furnished. In the event of non-furnishing of the above, the higher Tax rate as per the applicable Act will apply.

11) DEPOSIT CERTIFICATE:

Deposit certificates will be sent to branch for hand delivery or despatched by speed post/courier to the given correspondence address in the application form and the Company shall not be held responsible for any loss or delay in transit or will be sent on registered mail if the TDS is not received. If the deposit receipt is not received by the Depositor(s) for any reason, the Depositor(s) should write to the company for enquiry. All expenses in this connection will be borne by the Depositor(s). Notwithstanding of reissuance of duplicate receipt, the cost of SFL is limited to the single deposit receipt only, against which money has been received by SFL. Under all circumstances, more re-issue of deposit receipt(s) by SFL against single deposit money will not result in duplication of payment or higher liability on the part of SFL.

12) DEPOSIT CERTIFICATE:

a) Deposits can be renewed from the date of maturity only if renewal instructions are received prior to 7 working days from date of maturity of the deposit. In such cases the rate prevailing on the date of maturity will be applicable.

b) Renewal of deposit will be for an amount of TDS, if any.

c) The depositor for auto renewal can make the renewal instructions to be auto-renewed on maturity as per the instructions specified in the application form. In such time instructions to the contrary are received by the Company, the same will be followed.

d) The Depositor can request to renew the deposit or postpone the deposit at any time prior to maturity of the deposit. If the depositor has not chosen any option, the company shall refund the applicable amount on maturity.

e) Depositor can be renewed for a higher multiple of Rs.1,000/- by giving suitable instructions for payment of balance amount. Such considerations can be done only on the date of maturity and therefore, the necessary remittance should reach the company at least one day before the maturity date.

f) In the case of A or S accounts, renewals starting from the first deposit in the case of A or S accounts are not permitted.

g) Renewal of deposit with outstanding balance is not permissible. Payment after adjustment of loan principal and interest will be made on maturity, if renewal instructions for the balance amount are not received at least 7 days in advance of the maturity.

h) For Mover Investments, if the Depositor has opted for auto renew and the Minor has become Major during the contract period or during the auto renewal period, then it is the responsibility of the Minor who has become Major and the Guardian who has signed the application to submit the PAN of the Minor who has become Major.

i) In case of auto renewals, the Depositor has to submit the Tax declaration form (Form 15G/H) as applicable to the service centre within 15 days of fixed deposit issuance, failing which all the investments (FD, RD and FPI) in the specific customer ID will be treated as Tax and appropriate TDS amount will be deducted and remitted to Income Tax Department, GOI.

13) LOSS/DEPOSIT:

a) The Company may grant an auto self-renewal, loan on 75% of the amount of deposit to the depositor after the expiry of three months from the date of deposit at rate of interest plus two per cent points above the current rate of interest.

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rr) The Company may grant an auto self-renewal, loan on



Shriram Finance Limited

Regd. Office: Sri Towers, Plot No. 14A, South Phase, Industrial Estate, Guindy, Chennai - 600 032. Ph: 044 485 24 666 www.shriramfinance.in
 Admin Office: 6th Floor (level 2), Building No.Q2, Aurum Q Parc, Gen 4/1, TTC, Thane Belapur Road, Ghansoli, Navi Mumbai 400710. Ph: +91-22-40957575.

Business Associate Name :

Business Associate Code :

Affiliate Business Associate :

Branch :

APPLICATION FORM FOR FIXED DEPOSIT (SOLE PROPRIETORSHIP, HUF, PARTNERSHIP FIRM, TRUSTS, INSTITUTIONS & CORPORATES)

Please fill the information in CAPITAL letters and tick in appropriate places, only with black or blue ink

I/We wish to apply for Fresh/Renewal of Deposit for a *Period of _____ months.

Payment Details

If Fresh, Cheque/RTGS/NEFT, UTR No _____ Amount: _____ Drawn on _____ Date : _____

If Renewal, Old Cert No. _____ Maturity Date _____ / _____ / _____ Renewal Amount Rs. _____

Part Refund Amount Rs. _____ Total Investment Amount _____ *Deposit Type : Fresh Renewal Both

*Type of Receipt

Physical Receipt
E-Receipt

*Form 15G submitted (For Trust / HUF only)

Yes No
(if No, TDS will be deducted)

*Maturity Instruction

Auto Refund
Renew only Principal
Amount
Renew, Principal
with Interest Amount
(If not opted will be treated as auto refund)

*Mode of Operation:

Proprietor
Any One Partner
As per Board Resolution
Others _____

*Scheme

Cumulative
Monthly interest
Quarterly interest
Half-Yearly interest
Yearly interest

*Type of Entity

Private LTD Partnership HUF Foreign Bodies LLP
Public LTD Sole Proprietor Government Trust Bank
Society Association Club Section 25/8 Company Others *Non-Profit Organisation YES NO *If yes Darpan ID _____

Company Identification No: / Registration No.: _____ Customer ID: (if existing investor) _____

CYKC No. (if any) _____ LEI No.: _____ LEI Expiry Date: _____ / _____ / _____

Name of Entity _____

Registered Address _____

City _____ State _____ * Pin Code _____ Country _____

* Date of Incorporation _____ / _____ / _____ *PAN _____

#Email ID: _____ *Mobile No. _____

Details of Bank Account (Cancelled cheque leaf to be submitted)

*Bank Account No. _____ *Bank Name _____

* MICR Code *Branch _____* IFSC Code *Account: Saving Current

Declaration: I/We have read the Terms and conditions of the company and accept that they are binding on me/us.

I/We hereby agree to abide by the attached terms and conditions governing the deposit.

I/We have gone through the financials and other statements/representations/particulars furnished/made by the company and after careful consideration. I/We/am/are making the deposit with the company at my/our own risk and volition.

I/We further declare that, I/We am/are authorized to make this deposit in the above mentioned scheme Shriram Unnati Fixed Deposits and that the amount kept in the deposit is through legitimate source and does not involve directly or indirectly any proceeds of schedule of offence and/or is not designed for the purpose of any contravention or evasion of the provisions of the Prevention of Money Laundering Act, 2002 and any Rules, Notifications, Guidelines or Directions there under, as amended from time to time. I/We shall provide any further information and fully co-operate in investigation as and when required by the company in accordance to the applicable Law. I/We further affirm that the detail provided by me/us is/are true in all respect and nothing has been concealed. I/We authorize Shriram Finance Limited to contact me/us, in person, by post, telephone, e-mail, using short messaging service (SMS), WhatsApp, Bots relating to my/our deposits.

My personal / KYC details may be shared with Central KYC Registry.

I hereby consent to receive information from Central KYC Registry through SMS/Email on my registered number/email address.

I hereby consent to download records from Central KYC Registry by using KYC identifier furnished by me/us

I/We confirm that the Company has explained and provided me / us the above information / Terms & Conditions in the vernacular language (mentioned in the SFL Financial Page) and the same has been understood by me.

Nomination Details U/S 45QB of RBI Act 1934 (Form DA1) – Sole Proprietorship

 I/We the above mentioned depositor(s) do not wish to Nominate I/We above named depositors at current address in your records, nominate the following person to whom in the event of my/our/minor's death the amount of this deposit may be returned by Shriram Finance Limited: Nominee name has to be printed on the certificate Yes No

Name of the Nominee: Mr./Mrs. _____ DOB of Nominee: _____ / _____ / _____

Address of Nominee: _____ City: _____ Pincode: _____

Nominee Relationship with First Applicant: Father Mother Son Daughter Spouse Others (Specify) _____

As the Nominee is minor on this date, I/We appoint _____ DOB of Appointee: _____ / _____ / _____

Address: _____

to receive amount of the said deposit on behalf of the nominee in event of my/our/minor's death during the minority of the nominee.

Signature of the Authorised signatories / Trustee(s) / HUF / Sole Proprietorship with Name and PAN details

Name of Authorised Signatory _____ PAN _____ Signature _____

1. _____

2. _____

3. _____

* Details are mandatory # Details mandatory for E-Receipt

Shriram Finance Limited



Know Your Customer (KYC) and FATCA-CRS Application Form

Please fill the information in CAPITAL Letters and in appropriate places

The information is sought under Prevention of Money Laundering Act, 2002, the rules notified thereunder and RBI guidelines on Know Your Customer For existing Depositor, the information furnished herein will supersede the information available in the records of SFL

Customer's Details (as per KYC documents)

CKYC No _____
(if any)

*Name _____

*Father Name _____

*Mother Name _____

Spouse Name (If Married) _____

Country of Birth _____ City of Birth _____

*Communication Address: _____

City _____ State _____ *Pin _____

Country _____ Birth Place _____

*Nationality _____ *Citizenship _____

*Permanent Address: _____

Paste latest passport size photograph with signature
(DO NOT STAPLE)

IGNORE if already submitted earlier

City _____ State _____ *Pin _____

Country _____

*Mobile No _____ #Email ID _____

* Fields are Mandatory # Mandatory for E-Receipt ^If investment amount <= Rs.49,999/- & PAN not available

*Category Member of Public Shareholder Director Relative of Director Promoter

* Marital Status:

Married Unmarried
 Others

*Occupation Type: Salaried Professional Self Employed

Student Housewife Retired Other (Please specify _____)

*If Self Employed: Manufacturing Professionals Service Provider Agriculture Trader

Nature of Business: Jewellers/Bullion Real Estate Stock Broker Other (Please specify _____)

*Please tick (✓) if the following is applicable to you Politically Exposed Person (PEP) Relative of PEP Not Applicable

*Annual Income:

Upto Rs. 3 Lakhs Above Rs. 3 Lakhs - 6 Lakhs Above Rs. 6 Lakhs - 15 Lakhs Above Rs. 15 Lakhs - 30 Lakhs Above Rs. 30 Lakhs

Source of Fund:

Salaried Business Income Agriculture Investment Income Sale of Asset Other (Please Specify) _____

*Proof of Identity (Self Attested)

Aadhaar issued by UIDAI
 Passport
 Driving Licence
 Voter ID Card
 Others : _____

ID No. _____

Expiry Date _____ / _____ / _____

*Proof of Address (Self Attested)

Aadhaar issued by UIDAI Expiry Date _____ / _____ / _____
 Passport _____ / _____ / _____
 Driving Licence _____ / _____ / _____
 Voter ID Card _____ / _____ / _____
 Others : _____

Please tick applicable tax resident declaration: (Any one)*

I am a tax resident of India and not resident of any other country or I am a tax resident of the country/ies mentioned below

Country	Tax identification Number	Identification Type (TIN or Other please specify)	Address Type for Tax Purpose <input type="checkbox"/> Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered office
			Address for Tax Purpose <input type="checkbox"/> Communication <input type="checkbox"/> Permanent <input type="checkbox"/> Please note Below
			Pin: _____ State: _____ Country: _____

#To also include USA, where the individual is a citizen/green card holder of USA

%In case Tax Identification No. is not available, kindly provide functional equivalents.

Depositor Declaration

I/We certify that we have read and understood the FATCA-CRS Terms and Conditions and hereby accept the same.

- (i) I/We have read and understood the particulars (including Taxpayer Identification Number) given hereby are true, correct and complete to the best of my/our knowledge and belief.
- (ii) I/We shall submit a new form to Shriram Finance Ltd., within 30 days if any information or certification in this form becomes incorrect/changed.
- (iv) I/We agree that as may be required by regulators, Shriram Finance Ltd. may be required to report my/our details to such regulators or close or suspend my/our account without any obligation of advising me/us of the same.
- (v) I/We understand that Shriram Finance Ltd. is relying on this information for the compliance of FATCA-CRS and agree not to hold Shriram Finance Ltd., their employees, authorised agents, service providers, liable for any consequences/losses/costs/ damages in

case of any of the above particulars being false, incorrect or incomplete or in case of my/our not intimating /delay in intimating any changes to the above particulars.

(vi) I/We agree to indemnify Shriram Finance Ltd. in respect of any false, misleading, inaccurate and incomplete information regarding my/our U.S.- person status or other Country Residential status or in respect of any other information as may be required under applicable tax laws.

(vii) I/We certify that, a. I/We is (1) an applicant taxable as a US Person under the laws of the United States of America (U.S.) or any state which is subject to U.S. federal income tax regardless of the source thereof, (2) an estate the income of which is subject to U.S. federal income tax regardless of the source thereof, (3) a trust the income of which is subject to U.S. federal income tax regardless of the source thereof or (4) a corporation which is subject to U.S. federal income tax regardless of the source thereof. (This clause is applicable only if the depositor is a US Person/Citizen); b. I/We is a applicant taxable as a tax resident under the laws of country outside India. (This clause is applicable only if the depositor is a Tax resident outside India).

Place : _____

*Date : _____ / _____ / _____

* Signature : _____

