



# FOLIO CONSOLIDATION REQUISITION

(For existing Unitholders only)

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I/We wish to consolidate all my/our below mentioned folio numbers into a single folio. Source Folios for Consolidation (Folios where the following are identical can be consolidated - All Holders Name, Order of Names, PAN, Tax Status, Holding Nature and Holding of investment.

Date: 

D	D	M	M	Y	Y	Y	Y
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## Source Folio/s:

1	2	3	4	5
6	7	8	9	10

(Bank particulars in the target folio has been retained for your redemption/dividend proceeds.)

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

## Nomination: (Refer point - 4 in the instructions below)

Nomination Registration form enclosed  I do not wish to nominate

**Declaration and Signatures:** I/We request Quantum Mutual Fund to consolidate all my/our investments in above mentioned folio nos. to the mentioned Target folio no. I understand that consolidation can take place only if All Holders Name, Order of Names, PAN, Tax Status, Holding Nature and Holding of investment are identical in all the mentioned folios. I/We agree that the contact details, bank mandate, address and nomination details in the Target Folio will be applicable and will prevail after consolidation even if they were different details in source folios.

I hereby give consent to receive communication via email, SMS, alerts, notifications or voice calls from Quantum Mutual Fund, even though my mobile number is registered under the National Do Not Call Registry (NDNC). This includes all statutory, product, transaction related & other communication. Please refer to our [privacy policy](#) here for complete details.

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

## ACKNOWLEDGEMENT: FOLIO CONSOLIDATION FORM - QUANTUM MUTUAL FUND

Source Folios for

Consolidation:

Target Folio Number:

Receiver's Signature & Seal

## Instruction points to be given below the form is -

- All Holders Name, Order of Names, PAN, Tax Status, Holding Nature and Holding of investment should be identical.
- After consolidation; details like bank mandate, nominee, communication details, etc. in the target folio will be registered under the folio.
- All joint holders to sign the form irrespective of the mode of holding.
- In case there is no nominee in the target folio nominee declaration or registration is mandatory (for single holding folios)
- Folios once consolidated cannot be separated.
- Consolidation is effected at the folio level and not at the scheme level. Accumulation of units will be reflecting in the total accumulated units and not separately in the Account Statement.
- After successful processing of the request, communication will be send on the registered contact details of the target folio.
- Demat folios cannot be consolidated.

