



<b>Annual Income</b>	Up to Rs. 15 lakh <input type="checkbox"/>	Rs. 15 lakh-Rs. 50 lakh <input type="checkbox"/>	Rs. 50 lakh+ <input type="checkbox"/>	<b>Occupation</b>	Self employed <input type="checkbox"/>	Salaried <input type="checkbox"/>	Retired <input type="checkbox"/>
<b>Father's/Spouse's Name</b>	<div style="display: flex; border-bottom: 1px dashed black; margin-bottom: 5px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Mr.</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Ms.</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Mrs.</div> <div style="flex-grow: 1;"></div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>First</span> <span>Middle</span> <span>Last</span> </div>						
<b>Mother's Name</b>	<div style="display: flex; border-bottom: 1px dashed black; margin-bottom: 5px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Mr.</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Ms.</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Mrs.</div> <div style="flex-grow: 1;"></div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>First</span> <span>Middle</span> <span>Last</span> </div>						
<p>If the First Applicant is a minor, please provide the below details:</p> <p><b>Guardian's Name</b> <span style="border-bottom: 1px dashed black; display: inline-block; width: 80%;"></span></p> <p><b>PAN/Form 60 (in absence of PAN) (mandatory)</b> <span style="border-bottom: 1px dashed black; display: inline-block; width: 80%;"></span></p>							

### Special Category

Refer Point no. 1 in Terms and Conditions for details

**Special Category** Bajaj Group Employee ☐ Organisation Name \_\_\_\_\_  
(Please provide a copy of your Bajaj Group Employee ID)

Senior Citizen ☐ Director or a promoter of BFL ☐ BFL Existing Customer ☐

Please provide your BFL LAN/Customer ID \_\_\_\_\_

**Please mention if you are a Bajaj Finance Limited shareholder** Yes ☐ No ☐ If yes, please mention your Folio No. \_\_\_\_\_

### Joint Applicant Details

Second Applicant's Name    -----  
 First Middle Last

Aadhaar no./Aadhaar card enrollment no./Virtual Identification Number (VID) (mandatory) -----

Date of Birth         PAN/Form 60 (in absence of PAN) (mandatory) -----

Mobile ----- CKYC No./KIN No. ----- Marital Status ☐ Married ☐ Unmarried ☐ Others

Father's/Spouse's Name    -----  
 First Middle Last

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

Occupation Type/Employment ☐ Business/Self-Employed ☐ Professional ☐ Service-Public Sector  
☐ Service-Private Sector ☐ Service-Government Sector

Address:  
 (Current/Correspondence Address) -----  
 -----

City/Town/Village ----- State/U.T. ----- Pin Code -----

Email ID ----- Gender ☐ M ☐ F ☐ O

Please tick (✓) If the following is additionally applicable to you: Politically Exposed Person (PEP) ☐ Relative of PEP ☐

Coloured  
Photograph  
of Second Applicant

### Joint Applicant Details

Third Applicant's Name

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First Middle Last

Aadhaar no./Aadhaar card enrollment no./Virtual Identification Number (VID) (mandatory)

Date of Birth  PAN/Form 60 (in absence of PAN) (mandatory)

Mobile CKYC No./KIN No. Marital Status ☐ Married ☐ Unmarried ☐ Others

Father's/Spouse's Name

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First Middle Last

Mother's Name

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First Middle Last

Occupation Type/Employment ☐ Business/Self-Employed ☐ Professional ☐ Service-Public Sector  
☐ Service-Private Sector ☐ Service-Government Sector

Address:  
(Current/Correspondence Address)

City/Town/Village State/U.T. Pin Code

Email ID Gender ☐ M ☐ F ☐ O

Please tick (✓) if the following is additionally applicable to you: Politically Exposed Person (PEP) Relative of PEP

Coloured  
Photograph  
of Third Applicant

**Loan against Fixed Deposit available. For details, refer to point No.5 in the Terms and Conditions.**

**KYC Details of First Applicant (tick whichever is applicable)**

		Applicant type							
Document type	KYC Document	Individual	HUF	Sole proprietorship	Partnership (unregistered)	Trust (registered)	Unincorporated association/body of individuals/unregistered trusts	Partnership (registered)	
Mandatory	Photo	Y <input type="checkbox"/>	NA	NA	NA	NA	NA	NA	
	Aadhaar Card / letter of Aadhaar enrollment/VID (Virtual Identification Number)	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	
	Pan card Or Form 60 + any 1 of the below OVD (Officially valid document)	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	
	Deed of declaration of HUF with List of coparceners signed by Karta and adult coparceners	NA	Y <input type="checkbox"/>	NA	NA	NA	NA	NA	
	Registration certificate	NA	NA	Y <input type="checkbox"/>	NA	Y <input type="checkbox"/>	NA	Y <input type="checkbox"/>	
	Deed	NA	NA	NA	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	
	Resolution of the body	NA	NA	NA	NA	NA	Y <input type="checkbox"/>	NA	
	GST Certificate	NA	NA	Y <input type="checkbox"/>	NA	NA	Y <input type="checkbox"/>	NA	
	Any information/document required to collectively establish the legal existence	NA	NA	NA	Y <input type="checkbox"/>	NA	Y <input type="checkbox"/>	NA	
OVD (Officially valid document)	Any 1 mandatory if current address different from address on Aadhaar card	Utility bill, which is not more than two months old, of any service provider	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		(a)Electricity bill	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		(b)Telephone bill	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		(c)Post-paid mobile phone bill	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		(d)Piped gas bill	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		(e)Water bill	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
	Any 1 mandatory if form 60 submitted instead of PAN	Identity card with applicant's photograph issued by Central/ State Government Departments, Statutory/ Regulatory Authorities, Public Sector Undertakings, Scheduled Commercial Banks and Public Financial Institutions	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	NA
		Property or Municipal Tax receipt;	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>
		Pension or family Pension Payment Orders (PPOs) issued to retired employees by Government Departments or Public Sector Undertakings, if they contain the address;	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	NA
		Letter of allotment of accommodation from employer issued by State or Central Government departments, statutory or regulatory bodies, public sector undertakings, scheduled commercial banks, financial institutions and listed companies. Similarly, leave and license agreements with such employers allotting official accommodation	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	Y <input type="checkbox"/>	NA
		Certificate/license issued by the municipal authorities under Shop and Establishment Act	NA	NA	Y <input type="checkbox"/>	NA	NA	NA	NA
		Sales and income tax returns	NA	NA	Y <input type="checkbox"/>	NA	NA	NA	Y <input type="checkbox"/>
		Certificate/registration document issued by Sales Tax/Service Tax/Professional Tax Authorities	NA	NA	Y <input type="checkbox"/>	NA	NA	NA	Y <input type="checkbox"/>
		License/certificate of practice issued in the name of the proprietary concern by any professional body incorporated under a statute	NA	NA	Y <input type="checkbox"/>	NA	NA	NA	NA
		Complete Income Tax Return (not just the acknowledgement) in the name of the sole proprietor where the firm's income is reflected, duly authenticated/acknowledged by the Income Tax authorities	NA	NA	Y <input type="checkbox"/>	NA	NA	NA	NA
Note: all documents collected should be certified copies									

Nomination to Deposit: Form DA 1: U/S 45 QB of RBI Act 1934

I/We, above named Depositors at above address, nominate the following person to whom in the event of my/our/minor's death the amount of this deposit may be returned by the Company:

1. #Name and Address of Nominee -----  
----- Relationship with Depositor ----- Date of Birth 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

2. As the nominee is a minor on this date, I/we appoint ----- (Name, Address and Age)  
to receive the amount of the said deposit on behalf of the nominee in event of my/our/minor's death during the minority of the nominee.  
(\*Strike out if not applicable)

\*Date of Birth (if nominee is a minor) -----

\*Place & Date:-----

Two Witnesses' Name & Signature 1)----- 2)----- Signature(s) of Depositor -----

\*Name should be same as that appearing on a valid ID proof of the nominee

Payment Details

Payment mode: Cheque ☐ Net Banking ☐ NEFT/RTGS ☐

Payment details (Cheque to be drawn in favour of 'Bajaj Finance Ltd. Fixed Deposit Account Number 00070350006738')

Cheque No. ----- Bank Name ----- Bank Account Number -----

Account Type ----- Branch ----- IFS Code -----

Transaction Date ----- Bank ID ----- PGI Reference No. -----

UTR No. (Applicable for deposit amount electronically transferred through RTGS) -----

(In case of RTGS mode of deposit or interest and maturity amount repayment desired in a separate account, please enclose a signed cancelled cheque of the same account with a valid IFS code)

\*Forms 15 G & 15 H are enclosed herewith. Please duly fill and submit the applicable form to BFL alongwith this Application Form. Non-submission of form or submission of incomplete/incorrect form may result in tax deduction.

Declaration

I/We declare that all the information provided by me/us in this application is true and correct. I/We confirm that I/we have read and understood the Terms and Conditions annexed to this Application. I/We hereby authorize the Company to pay the interest and Deposit amount upon maturity or upon the payment frequency selected by me/us, as the case may be, using the available online banking payment system, to the bank account stated by me/us in this Application or into such other bank account as may be instructed by me/us (jointly) in writing to the Company during the term of the Deposit. I/We understand that the fixed deposit receipt is non-transferable. I/We declare that the amount being deposited is not out of borrowed funds or funds acquired by accepting deposits from any other person or through any illegal or wrongful means. I/We confirm that I/we have gone through the detailed terms including the interest rate and other charges, the financials and other statements/particulars/representations furnished 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 declare that the first named depositor mentioned in this application should be treated as the payee for the purpose of deduction of tax, under Section 194A of the Income Tax Act, 1961, as may be applicable. I/We declare that any and all deposit(s) under the fixed deposit schemes of the Company held by me/us will be disclosed as may be required by the Company without withholding any material information.

Signature of all Depositors with date:

First Applicant ----- Second Applicant ----- Third Applicant -----

Aadhaar Declaration

- (1) I/We hereby confirm that I/we have no objection in authenticating myself/ourselves with Aadhaar based authentication system. I/We consent to provide and authenticate my/our Aadhaar number through the available mode of Aadhaar based authentication, as permitted under the prevailing law/regulation, for the purposes of availing this product/service and for availing such other third-party products/ service from the Company under this Application.
- (2) I/We understand that the Aadhaar based authentication shall be used only for authenticating my identity with Central Identities Data Repository for the aforementioned specific purpose(s).
- (3) I/We hereby authorize the Company to store my/our KYC data/documents provided under this Application including my/our Aadhaar number, proof of identity and address obtained from UIDAI, in accordance with prevailing laws and regulations.

Signature of all Depositors with date:

First Applicant ----- Second Applicant ----- Third Applicant -----

FATCA/CRS Details for Individual Applicants (mandatory)

Below information is required for all applicants/guardian

	Place / City of Birth	Country of birth	Country of citizenship/nationality		
First applicant/guardian			India <input type="checkbox"/>	USA <input type="checkbox"/>	Others.....
Second applicant			India <input type="checkbox"/>	USA <input type="checkbox"/>	Others.....
Third applicant			India <input type="checkbox"/>	USA <input type="checkbox"/>	Others.....

Are you a tax resident (i.e. are you assessed for tax) in any other country outside India? Yes ☐ No ☐

If 'yes', please fill below details for all countries (other than India) in which you are a resident for tax purpose  
i.e where you are a citizen/resident/green card holder/tax resident in the respective countries

	Country of tax residency	Tax Identification number or functional equivalent	Identification type (TIN or other, please specify)	If TIN is not available, please tick the reason A,B or C (as defined below)
First applicant/guardian				Reason A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/>
Second applicant				Reason A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/>
Third applicant				Reason A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/>

Reason A→The country where the applicant is liable to pay tax does not issue Tax Identification numbers to its residents

Reason B→No TIN required (select this ONLY if the authorities of the respective country of tax residence do not require the TIN to be collected)

Reason C→Others, please state the reason thereof.....

Address type of first applicant

Residential ☐ Registered ☐ Business ☐

Date & Place:

Signature of first applicant

Address type of joint applicant

Residential ☐ Registered ☐ Business ☐

Date & Place:

Signature of joint applicant

Address type of joint applicant

Residential ☐ Registered ☐ Business ☐

Date & Place:

Signature of joint applicant

## Terms and Conditions

### 1. ACCEPTANCE OF DEPOSITS:

- Bajaj Finance Limited (hereinafter referred to as the "Company") shall accept fixed deposit ("Deposit") at its sole and absolute discretion and subject to the terms and conditions contained herein.
- The applicant agrees and acknowledges that the applicant (a) is 18 (eighteen) years of age; (b) is of sound mind; (c) can understand, read and write in English language, (d) has read, understood and agrees to be bound by these terms. Where the applicant is a minor, the Company may accept the Application provided the Application is signed by the natural guardians of the minor on behalf of the minor and upon submission of such documents as may be required by the Company.
- The Company does not accept deposits from NonResident Indians and foreign nationals.
- The Company shall accept Deposits subject to the minimum amount of deposit prescribed by the Company from time to time. In the event amount received by the Company for opening Deposit is less than the minimum amount prescribed in this regard, the Company reserves the right to reject the application for opening Deposit. No interest shall be payable by the Company in relation to such deposits.
- Deposits shall not be accepted in cash.
- The applicant agrees to submit all documents and information as may be required by the Company in relation to the Deposit, in such form and manner as may be prescribed by the Company.
- The Company reserves the right to accept or reject any application received for opening or placing the Deposit ("Application") without assigning any reason whatsoever. The amount in relation to such rejected Application will not earn any interest and the said amount will be refunded as is within 11 (eleven) business days including in case of failure on applicant's part to submit documents in relation to the Application, as required by the Company.

### 2. JOINT DEPOSITS:

- Application may be made in joint names subject to a maximum of three applicants. The Deposit will be opened in joint names subject to the condition that all the applicants (a) sign the Application in their individual capacities (b) submit documents as specified by the Company and (c) meet the eligibility criteria specified by the Company.
- All communications in relation to the Deposit will be addressed in the name of the first applicant appearing in the Application.
- All the payments in relation to the Deposit placed in joint names including interest and maturity proceeds, will be made in the name of the first applicant in the Application including for the purpose of deduction of tax at source and any discharge given by such first applicant in respect to any payments made by the Company will be binding on the other joint depositor(s).

### 3. FIXED DEPOSIT RECEIPTS

- Fixed Deposit Receipts ("FDR") will be sent to the depositor(s) through speed post within a period of three weeks from the date of Deposit.
- FDR is not transferable. The Company will not accept or recognise any lien or assignment on the deposit and/or interest thereon.
- In the event of loss or destruction or mutilation of a FDR/interest warrant, the Company may, at its sole discretion, issue a duplicate receipt/warrant, on such terms and conditions as deemed fit by the Company. All expenses, if any, incurred in this connection will be borne by the depositor(s).

### 4. INTEREST:

- Individual applicants falling under specific categories as mentioned below will be eligible for the following special interest rates:
  - Senior citizens (i.e. persons more than 60 years of age, subject to provision of proof of age): Additional interest at the rate of 0.35% p.a. will be provided on Deposit amount of up to Rs. 5 (five) crore;
  - Existing customers of the Company: Additional interest at the rate of 0.25% p.a. will be provided on Deposit amount of up to Rs. 5 (five) crore; or
  - Employees of Bajaj Group: Additional interest at the rate of 0.25% p.a. on Deposit amount of up to Rs. 5 (five) crore.The applicant will be eligible for only one of the above mentioned special category benefits per deposit transaction, except in the following circumstances where additional interest may be provided over and above the special category benefit:
  - Only individual Applicants applying for renewal of Deposit: Additional interest at the rate of 0.25% p.a. will be provided on Deposit amount of up to Rs. 5 (five) crores; and
  - Bulk Deposits of more than Rs. 5 (five) crores: The rate of interest applicable for bulk deposits for an amount exceeding Rs. 5 (five) crores may vary from the published rate card and the same shall be decided by the Company, at its sole and absolute discretion, on a case to case basis.
- Interest payable on a Deposit will be calculated from the date of receipt of the funds by the Company in relation to the Deposit. The dates for interest payments are as follows:
  - In case of non-cumulative Deposits:
    - Monthly interest payments: Last date of month
    - Quarterly interest payments: 31st March, 30th June, 30th September and 31st December
    - Half yearly interest payments: 31st March and 30th September
    - Annual interest payments: 31st March
  - In case of Cumulative Deposits: Date of maturity of the Deposit
  - Interest for part period (i.e. other than complete month/quarter/half year/year) under Non-Cumulative Deposit Schemes will be calculated from the date of Deposit till the last day of the immediate next interest payment date. If a Deposit is made within a period of 30 (thirty) days prior to any of the interest payment dates, the interest for the part period will be paid on the next interest payment date.
- Once the applicant selects the Deposit scheme specified in the Application at the time of opening the Deposit i.e. the scheme, tenor and interest payout frequency, the applicant will not have the option to subsequently revise the Deposit scheme. In the event the scheme is not indicated in the Application received by the Company, the Deposit will suo moto be opened under cumulative deposit scheme for a period of 60 (sixty) months. In case the applicant opts for non-cumulative deposit option but the interest payout frequency is not indicated in the Application, the Deposit will be treated as placed under the annual interest payout frequency scheme.
- The interest will be paid through National Electronic Funds Transfer (NEFT)/ Real Time Gross Settlement (RTGS) only. In case of any rejection of such instruction for NEFT / RTGS due to any reason, the Company will dispatch interest warrant, in favour of the first applicant in the Application, within 10 (ten) days of the receipt of intimation by the Company from its bank about such rejection.

### 5. NOMINATION:

- Nomination facility is available to the depositors. For availing the nomination facility, the applicant will be required to submit a duly filled "Form DA 1" prescribed by the Reserve Bank of India. The aforesaid form is available at Company's branches & Company's website at <https://www.bajajfinserv.in/fixed-agreements-terms-and-conditions> ("Website"). Nomination made by the depositor/applicant through the said form and in the manner prescribed by the Company, shall be binding on all the joint depositor(s).
- Upon request of the depositor(s), the Company will arrange to send forms for cancellation of nomination (Form DA 2) and variation of nomination (Form DA 3).

### 6. PAYMENT AND RENEWAL OF DEPOSIT

- Payments on account of interest and redemption of the Deposit, will be made in the bank account mentioned in the Application or such other bank account intimated by the deposit holder(s) (jointly, if applicable), in writing, to the Company from time to time or by way of warrant in favour of the first applicant appearing in the Application.
- The Company will make repayment of Deposit on the date of maturity of such Deposit unless it receives any request for renewal within the prescribed period before the date of maturity. The payment will be made through NEFT/RTGS only, to the bank account of the depositor mentioned in the Application. In case of any rejection of such instruction for NEFT/RTGS for any reason, the Company will dispatch maturity repayment warrant, in favour of the first applicant appearing in the Application, within 10 (ten) days of the receipt of intimation by the Company from its bank about such rejection.
- In the event of death of the sole depositor and/or all the joint depositors, all payment(s) in relation to the Deposit including interest thereon will be made to the nominee appointed by the depositor(s) on production of proof of identity and on execution of such other documents as may be required by the Company in this regard. In the event there is no nomination by the sole depositor, the Deposit amount including interest thereon will be transferred to the legal heirs or legal representatives of the deceased depositor(s), as the case may be, upon submission of Succession Certificate/Letter of Administration/Probate of the Will to the satisfaction of the Company. In the case of joint depositors, the nominee's right to receive the amount of Deposit including interest shall arise only after the death of all the depositors. The nominee, in the event of death of the depositor(s) would receive such amounts in trust for the legal heirs.
- Request for renewing the Deposit (or a portion thereof) can be made either by visiting the Website or

<https://mysite.bajajfinservlending.in/FDRenewal.aspx> or by visiting the Company's customer portal at <https://customer-login.bajajfinserv.in/> ("Experia"), atleast 2 (two) business days before the maturity date of Deposit OR physically atleast 2 (two) business days before maturity date of Deposit by visiting the nearest Company branch or by sending a written request through the independent financial advisors or financial distributors empaneled with the Company, to enable the Company to repay and/or renew the Deposit (or a portion thereof) as the case may be on the due date. No requests for renewal of Deposit shall be accepted post the above-mentioned period. Request for renewal should be accompanied by the Deposit application form duly filled in and signed by all the Deposit holders. Renewal of Deposits will be subject to the rate of interest and other terms & conditions prevailing on the date of renewal. FDR of the existing deposit may not be required at the time of renewal of deposits as it stands null & void post its maturity date.

### 7. PREMATURE WITHDRAWAL:

- Deposits may be withdrawn prior to the date of maturity subject to the regulations of the Reserve Bank of India in this regard. Please note that premature withdrawal of Deposit (including death cases) is subject to the following conditions:
  - Up to 3 (three) months from date of Deposit: No withdrawal of the Deposit is permitted. However, in the event of death of a depositor, the Company may repay the Deposit prematurely (irrespective of the lock in period) to the surviving depositor (which in the case of joint holders will be the first in the sequence of applicants in the Application) or to the nominee/legal heir(s) of the deceased depositor, upon the request of surviving depositor/s/nominee/legal heir, as the case may be, and only subject to submission of proof of death and other requisite documents to the satisfaction of the Company.
  - After 3 (three) months but before 6 (six) months from the date of the Deposit: No interest will be paid.
  - After 6 (six) months but before the date of maturity of the Deposit: Interest will be paid at a rate which is 2% lower than the rate specified for the period during which the scheme has run. In case no rate is specified for the Deposit period, interest rate payable will be 3% lower than the lowest rate being offered by the Company.
  - Income tax wherever applicable and deducted at source and remitted to the applicable tax authority by the Company on behalf of the depositor, before premature withdrawal of Deposit(s), shall not be refunded in any circumstance whatsoever.

### 8. LOAN AGAINST DEPOSIT:

'Loan against the deposit' facility may be provided to depositors against the Deposit(s) placed with the Company, subject to fulfillment by depositor(s) of the eligibility criteria and other conditions, as may be prescribed by the Company in this regard. A depositor becomes eligible for availing the facility only post the expiry of 3 months' period from the Deposit being on books of the Company. The interest rate on such loans shall be 2% higher than the rate of interest provided on the depositor's Deposit. Please note that the loan to deposit value for such loan facility cannot exceed 75%.

### 9. OTHER TERMS

- Income-tax, wherever applicable, will be deducted at source on the Deposit in accordance with Section 194-A of the Income-tax Act, 1961 except where appropriate Certificate/Form as prescribed under the Income Tax Act, 1961 (refer to Form 15G/H enclosed with the application form) is furnished to Company's registered office at least 2 (two) months prior to the due date of payment of interest. At present tax is deductible if the aggregate amount of interest paid or payable during the financial year exceeds Rs. 5,000/- (Rupees five thousand only). It is the sole responsibility of the depositor to provide the Company with a fresh Form 15G/H for every assessment year. Non-submission of relevant form or submission of incomplete/incorrect form may result in tax deduction and BFL will not be responsible for the same. Customers can also fill Form 15 G/H through Experia.
- In the event of cheque bounce, the cheque will be sent back to applicant's address mentioned on the Application within 15 (fifteen) days. For all RTD cheque cases, the cheque will be held by the Company until the validity of the instrument, post which it will be destroyed without further notice to the applicant.
- In the event of loss or destruction or mutilation of a Fixed Deposit Receipt/Interest Warrant, the Company may, at its sole discretion, issue a duplicate receipt/warrant, on such terms and conditions including indemnification, as it may think fit. All costs incurred in this connection will be borne by the depositor(s).
- In the event of death of any of the joint depositors, any modification in the names of the deposit holders appearing on the FDR and/or change in the bank account where interest and/or maturity proceeds are to be credited, shall be effected only upon submission of a notarized copy of the death certificate in the name of the deceased depositor alongwith appropriate instruction, to the Company, issued jointly by all the surviving deposit holder(s), in writing, to carry out such modifications.
- All communications in relation to the Deposit will be addressed in the name of the first applicant as per the Application.
- The Company will send all communications to the deposit holder(s) in electronic form from time to time at the email ID mentioned in the Application. In case of failure in transmission of such communication, the Company will send physical copy of such communication within 10 (ten) days of such failure of transmission.
- Any change in the address, email ID, bank account etc., mentioned in the Application shall be effected by the Company only on the basis on written instruction signed by all the concerned deposit holder(s).
- The Company reserves the right to alter, amend or delete any or all the conditions stipulated above or to vary them in special cases or to accept Deposits only for such periods as it may decide from time to time and to repay the Deposits prematurely before the date of maturity.
- The accompanying advertisement inviting fixed deposits forms part of the Application.
- Disputes, if any, arising in connection with the Deposit, will be subject to the exclusive jurisdiction of Courts at Pune.
- By submitting this Application, I/we hereby expressly authorise the Company to send me/us communications regarding loans, insurance and other products from the Company, its group companies and/or third parties through telephone calls/SMSs/emails/post etc. including but not limited to promotional communications, irrespective of rejection of my/our Application. I/We confirm that I shall not challenge receipt of such communications by me/us as unsolicited communication, defined under TRAI Regulations on Unsolicited Commercial Communications. I/We understand that I/we can at any time opt not to receive any telecommunication by registering under the Do Not Call Registry.

### 10. HOW TO APPLY

- Depositor(s) are requested to go through the terms and conditions as mentioned above. These terms and conditions form part of the Application.
- The attached application form should be duly filled and signed by the applicant(s).
- The amount should be deposited only by a CTS compliant account payee cheque drawn in favour of 'BAJAJ FINANCE LTD - ACCOUNT NUMBER 00070350006738' clearly stating the deposit amount alongwith the application number on the rear side of the cheque.
- Application form alongwith the cheque and required documents may be submitted with any of Company's branch or authorised distributors.
- Customers who wish to apply online, can do so for a maximum amount of Rs. one lakh for a tenure of one year, through the Website or <https://mysite.bajajfinservlending.in/FDhome.aspx> Experia. Deposits opened through the aforesaid online mechanism cannot be renewed. The aforesaid restrictions are however, not applicable to existing Customers of the Company, subject to fulfillment of certain criteria laid down by the Company.
- Customers who wish to renew Deposits online, can do so through the Website or <https://mysite.bajajfinservlending.in/FDRenewal.aspx> Experia.
- Introduction of all the applicants is compulsory. Such introduction may be by any one of the following methods:
  - In case the applicant is an existing fixed deposit holder with BFL, the applicant can introduce himself/herself by giving details of applicant's existing fixed deposit receipt;
  - The applicant can also obtain introduction from any other fixed deposit holder with BFL. The said existing depositor will be required to disclose his/her name and fixed deposit receipt number and provide his/her signature, as per specimen signature in BFL records;
  - The applicant can also introduce himself/herself by producing original of any one of the documents (which contains the photograph of the applicant) mentioned in the list of Mandatory and Officially Valid Documents provided in the Application and a recent coloured photograph to BFL for verification. The aforesaid coloured photograph and a copy of such document produced is required to be attached with the Application.

### 11. IMPORTANT INFORMATION

- In the event of non-repayment of the Deposit or part thereof as per the terms and conditions of such Deposit, the depositor may approach National Company Law Tribunal, Mumbai Bench at: 6th Floor, Fountain Telecom, Building 1, Mahatma Gandhi Road, Fort, Mumbai, Maharashtra 400001
- In case of any deficiency by the Company in servicing its Deposit, the depositor may approach the District Level Consumer Redressal Forum, the State Level Consumer Redressal Forum or the National Consumer Redressal Forum for relief.

\*Bajaj Holdings and Investment Ltd., Bajaj Auto Ltd., Bajaj Finserv Ltd., Bajaj Finance Ltd., Maharashtra Scooters Ltd., Bajaj Allianz General Insurance Ltd., Mukand Ltd. and Bajaj Electricals Ltd.



## Provisional Receipt

Received from \_\_\_\_\_ Cheque No. \_\_\_\_\_ for INR \_\_\_\_\_

dated \_\_\_\_\_ drawn on \_\_\_\_\_ Bank \_\_\_\_\_ Branch \_\_\_\_\_

towards \_\_\_\_\_ Scheme for a period of \_\_\_\_\_ months at \_\_\_\_\_ % interest per annum.

Reference No. \_\_\_\_\_

For BAJAJ FINANCE LTD

Write to us at [wecare@bajajfinserv.in](mailto:wecare@bajajfinserv.in) or call our toll-free IVR on 020 3957 4151



\*This Provisional Receipt is valid only till the issuance of the Fixed Deposit Receipt

Application Number



# BAJAJ FINANCE LIMITED

Registered Office: Akurdi, Pune 411 035

Corporate Office: 4th Floor, Bajaj Finserv Corporate Office, Off Pune-Ahmednagar Road, Viman Nagar, Pune 411 014

## Fixed Deposit Schemes 'FAAA/Stable' Rating by CRISIL | 'MAAA (Stable)' Rating by ICRA

'FAAA/Stable' Rating by CRISIL and 'MAAA (Stable)' Rating by ICRA indicate the highest degree of safety with regard to timely payment of interest and principal on the instrument.

Retail rate of interest per annum valid up to Rs. 5 crore

Tenor in months	Minimum deposit (in Rs.)	Cumulative	Non-cumulative			
			Monthly	Quarterly	Half yearly	Annual
12 – 23	25,000	7.60%	7.35%	7.39%	7.46%	7.60%
24 – 35		8.15%	7.88%	7.93%	8.00%	8.15%
36 – 60		8.40%	8.13%	8.18%	8.25%	8.40%
Special tenor scheme						
15	1,00,000	7.85%	7.60%	7.64%	7.71%	7.85%

- Senior citizens (more than 60 years of age, subject to provision of proof of age) – Additional rate of 0.35% p.a. for deposit size up to Rs. 5 crores. Applicable ROI given on page 1 of the application form
- Bajaj Group employees – Additional rate of 0.25% p.a. (BHL, BAL, BFS, BFL, MSL, BAGIC, BALIC, MUKAND and BAJAJ ELECTRICALS) for deposit size up to Rs. 5 crore
- Bajaj Finance Limited existing loan customers – Additional rate of 0.25% p.a. for deposit size up to Rs. 5 crores
- Bajaj Finance Limited existing FD customers – Additional rate of 0.25% p.a. for deposit size up to Rs. 5 crores (investor needs to have a gap of 2 months between the first and the second deposit to avail the benefit of 0.25%)
- Only one of the above special category benefits is allowed per transaction
- Fixed Deposit renewal customers – Additional rate of 0.25% p.a. for deposit size up to Rs. 5 crore. Additional rate is applicable over and above special category benefit
- Rate of interest for bulk deposits of more than Rs. 5 crore may vary from the published card rate and to be decided on a case to case basis by Bajaj Finance Limited
- Minimum deposit size is Rs. 25,000.
- Particulars to be furnished as per the Non-Banking Financial Companies & Miscellaneous Non-Banking Companies (Advertisement) Rules, 1977 as amended.

A. Name of the company: **BAJAJ FINANCE LTD.** (Rs. in crore)  
B. Date of incorporation: **25th March 1987**

C & D. Profits/Dividends:  
Profits of the Company before and after making provisions for tax, for the three financial years immediately preceding the date of the advertisement and the dividends declared by the Company in respect of the said years.

Financial Year ended on	Profit (Standalone)		Dividend %
	Before Tax	After Tax	
31.03.2016	1964.57	1278.52	250
31.03.2017	2817.52	1836.55	180
31.03.2018	4056.36	2646.7	200

### E. Brief particulars of the management of the Company:

The Company is managed by the Managing Director, subject to the control and supervision of the Board of Directors. The Managing Director is entrusted with necessary powers for managing the business and affairs of the Company.

### F. Names, addresses and occupations of Directors:

NAME	ADDRESS	OCCUPATION
Shri Rahul Bajaj Chairman	Bajaj Vihar Colony, Mumbai-Pune Road, Akurdi, Pune 411 035	Industrialist
Shri Nanoo Pamnni Vice Chairman	21 El CID 13 A, Ridge Road, Malabar Hill, Mumbai 400 006	Professional
Shri Sanjeev Bajaj Vice Chairman	Bajaj Vihar Colony, Mumbai-Pune Road, Akurdi, Pune 411 035	Industrialist
Shri Rajeev Jain Managing Director	D-2, Ivy Glen, Marigold Premises, Kalyani Nagar, Pune 411 014	Service
Shri Madhur Bajaj	Bungalow No. 3, Bajaj Vihar Colony, Mumbai-Pune Road, Akurdi, Pune 411 035	Industrialist
Shri Rajiv Bajaj	Bajaj Vihar Colony, Mumbai-Pune Road, Akurdi, Pune 411 035	Industrialist
Shri D S Mehta	301/302 Gora Gandhi Apartments, 3rd Floor, 3 Laburnam, Gamdevi, Mumbai 400 007	Business
Shri D J Balaji Rao	D-103, Adarsh Residency, 47 Cross 2nd Main, 8th Block, Jayanagar, Bangalore 560 082	Professional
Dr. Omkar Goswami	E-121, Masjid Moth, First Floor, Greater Kailash 3, New Delhi 110 048	Economist
Shri Dipak Poddar	Brij Kutir, Rungta Lane, 17th Floor, Off Nepean Sea Road, Mumbai 400 026	Industrialist

Shri Ranjan Sanghi	Flat No. 21, Mistry Court, 4th Floor, Dinshaw Vachha Road, Mumbai 400 020	Business
Shri Rajendra Lakhota	Universal Auto Traders, M.G. Marg, Gangtok 737 101, Sikkim	Business
Dr. Gita Piramal	Piramal House, 6th Floor, 61, Pochkhanwala Road, Worli, Mumbai 400 025	Business

### G. Summarised Financial Position of the Company (standalone) as appearing in the two latest audited balance sheets:

(Rs. in crore)

EQUITY & LIABILITIES	As on 31.03.2018	As on 31.03.2017
<b>Shareholders' funds:</b>		
Share capital	115.03	109.37
Reserves & surplus	16,403.26	9,490.94
Money received against share warrants	0.00	0.00
<b>Non-current liabilities:</b>		
Long term borrowings	43,167.89	33,115.96
Other long term liabilities	487.53	484.87
Long term provisions	1,121.68	1,085.62

### Current liabilities:

Current maturities of long term borrowings		
Secured loans	6,565.00	6,377.36
Unsecured loans	1,262.83	833.91
Short term borrowings	10,571.31	8,922.42
Trade payables	453.99	309.04
Other current liabilities	3,292.07	2,791.63
Short term provisions	188.43	209.32
<b>Total</b>	<b>83,629.02</b>	<b>63,730.44</b>

(Rs. in crore)

ASSETS	As on 31.03.2018	As on 31.03.2017
<b>Non-current assets:</b>		
Fixed assets		
- Tangible assets	343.87	285.90
- Intangible assets	120.79	75.23
Non-current investments	2,365.58	1,090.30
Deferred tax assets (net)	386.41	369.07
Receivables under financing activity	43,807.32	32,028.10
Long-term loans and advances	79.91	59.86

### Current assets:

Current investments	1,294.88	2,984.40
Receivables under financing activity	34,203.92	25,654.78
Cash and bank balances	228.73	325.80
Short term loans and advances	256.64	501.17
Other current assets	540.97	355.83

**Total** **83,629.02** **63,730.44**

(Rs. in crore)

Contingent Liabilities (Standalone)	As on 31.03.2018	As on 31.03.2017
-------------------------------------	------------------	------------------

Disputed claims against the Company not acknowledged as debts	31.27	17.29
VAT matters under Appeal	2.39	2.24
ESI matter under Appeal	5.14	5.14
Service tax matter under appeal		
- On interest subsidy	1,243.80	1,147.10
- On others	3.11	4.43
Income Tax matters under Appeal		
- Appeals by the Company	8.90	12.93
- Appeals by the income tax department	32.98	32.98

The above text of advertisement has been issued on the authority and in the name of the Board of Directors and has been approved by the Board of Directors at its meeting held on 17th May 2018 and copy of the same signed by the majority of Directors has been delivered to the Reserve Bank of India for registration.

Pune  
17th May 2018

### HOW TO INVEST:

The amount should be deposited only by cheque made payable to 'BAJAJ FINANCE LTD – ACCOUNT NUMBER 00070350006738' and crossed 'Account Payee only'. The cheques should be payable at par and CTS compliant. Application Form along with the necessary remittance should be sent to the Distributors of the Fixed Deposit Schemes of BFL or be submitted at any of the BFL branches.

Write to us at [fd@bajajfinserv.in](mailto:fd@bajajfinserv.in) or call us on 020 71124281

H. a) Amount which the Company can raise by way of Deposits as per Non-Banking Financial Companies Acceptance of Public Deposits (Reserve Bank) Directions, 2016 Rs. 24,015.75 crore.

b) Deposits actually held as on 31.03.2018 Rs. 5,705 crore

I. The aggregate dues from the facilities, both fund and non-fund based, extended to, the companies in the same group or other entities or business ventures in which the Director/Company are holding substantial interest are Rs. 61.95 crore.

J. The Company has no overdue deposits other than undaimed deposits.

K. The Company declares as under:

- The Company has complied with the provisions of the directions applicable to it.
- The compliance with the directions does not imply that the repayment of Deposits is guaranteed by the Reserve Bank of India.
- The deposits accepted by the Company are unsecured and rank pari passu with other unsecured liabilities.
- The deposits solicited by the Company are not insured.
- The Financial position of the Company as disclosed and the statements made in the application form are true and correct. The Company and its Board of Directors are responsible for the correctness and veracity thereof. The financial activities of the Company are regulated by Reserve Bank of India. It must, however, be distinctly understood that Reserve Bank of India does not undertake any responsibility for the financial soundness of the Company or for the correctness of any of the statements or the representations made or opinion expressed by the Company and for repayment of deposits/discharge of liabilities by the Company.

L. The deposits shall also be subject to the terms and conditions as per the application form.

M. Premature repayment of Fixed Deposit is at the sole discretion of BFL. However, in such case the interest will be allowed as per the regulations of the Reserve Bank of India in that behalf. The present directions for premature repayment provides as under:

- Up to 3 months from date of deposit: No withdrawal permitted
- After 3 months but before 6 months: No interest
- After 6 months but before the date of maturity: 2% lower than the rate specified for the period during which the scheme has run. In case of no rate being specified for the deposit period, interest rate payable will be 3% lower than the lowest rate being offered by BFL.

N. The Business carried on by the Company and its subsidiaries with details of branches or units if any:

- Business carried on by the Company and its branches:  
Providing consumer finance ranging from vehicle loans, consumer durable financing, personal loans, loan against property, Home Loans, construction equipment financing, small business loans, loan against securities and infrastructure financing. The Company is having its Branches at Agra, Ahmedabad, Ahmednagar, Ajmer, Akola, Akot, Alappuzha, Allahabad, Ambala, Amravati, Amreli, Amritsar, Anand, Anantpur, and Ankaleshwar, Asansol, Aurangabad, Bagalkot, Bangalore, Baramati, Bardoli, Bareilly, Baroda, Barshi, Belgaum, Bellary, Bhandara, Bharuch, Bhatinda, Bhavnagar, Bhilai, Bhiwandi, Bhopal, Bhuvaneshwar, Bhub, Bidar, Bijapur, Bikaner, Bilaspur, Bokaro, Bopur, Borsad, Calicut, Changanassery, Chandigarh, Chandrapur, Chennai, Chhindwara, Chikluli, Chiplun, Chitradurga, Chittaranjan, Chopda, Cochin, Coimbatore, Cuddalore, Cuttack, Dabhoi, Dahod, Davangere, Dehradun, Dewas, Dhanbad, Dharapuram, Dharwad, Dhule, Dindigul, Durgapur, Eluru, Erode, Gandhidham, Goa, Gokak, Gulbarga, Guna, Guntur, Gwalior, Haldia, Halol, Hassan, Haveri, Himatnagar, Hoshangabad, Hoshiarpur, Hospet, Hubli, Hyderabad, Indore, Jabalpur, Jagadhri, Jaipur, Jalandhar, Jalgaon, Jalpaiguri, Jammu, Jamnagar, Jamner, Jamshedpur, Jodhpur, Junagadh, Kadi, Kaithal, Kakinada, Kalka, Kanpur, Kanpur, Kapurthala, Karad, Karaikudi, Karnal, Karunagappally, Karur, Karwar, Katni, Khamgaon, Khandwa, Kharagpur, Kolar, Kolhapur, Kolkata, Kollam, Kopergaon, Korba, Kota, Kottayam, Kurnool, Kurukshetra, Latur, Lucknow, Ludhiana, Machilipatnam, Madurai, Mandya, Mangalore, Mapusa, Margao, Mehsana, Moga, Morbi, Mumbai, Mysore, Nabha, Nadiad, Nagarcoll, Nagpur, Namakkal, Nanded, Nandurbar, Nashik, Navsari, Nellore, New Delhi, Palanpur, Pandharpur, Panipat, Patiala, Patna, Pen, Phagwada, Pimpalgaon, Pollachi, Pondicherry, Pune, Puttur, Raichur, Raipur, Rajahmundry, Rajgurunagar, Rajkot, Rajnandangaon, Rajpura, Ranaghat, Ranchi, Rattlam, Ratnagiri, Rewa, Rohtak, Ropar, Rourkela, Salem, Sangli, Satara, Satna, Sehore, Shimla, Shimoga, Siliguri, Sirsa, Solapur, Surat, Surendranagar, Tanjore, Tenali, Thiruvalla, Tirunelveli, Tirupati, Tirupur, Trichur, Trichy, Trivandrum, Tumakuru, Tuticorin, Udaipur, Udipi, Ujjain, Vadakara, Valsad, Vapi, Varanasi, Vidisha, Vijayawada, Vizag, Vizianagaram, Wani, Warangal, Wardha, Warud, Washim, Yavatmal and all other branches mentioned in the official website page [www.bajajfinserv.in](http://www.bajajfinserv.in) Finance->Reach Us->Locate Us or by directly clicking [www.bajajfinserv.in/finance/branch-locator.aspx](http://www.bajajfinserv.in/finance/branch-locator.aspx)

2. Business carried on by the subsidiaries of the Company:

Sr. No.	Name of Subsidiary	Address of Registered Office	Activity
1	Bajaj Housing Finance Limited (formerly Bajaj Financial Solutions Limited)	Bajaj Auto Ltd. Complex, Mumbai-Pune Road, Akurdi, Pune 411035	Housing Finance Business (proposed)
2	Bajaj Financial Securities Limited	Bajaj Auto Ltd. Complex, Mumbai-Pune Road, Akurdi, Pune 411035	Stock Broking

By order of the Board of Directors  
for Bajaj Finance Limited

(Rahul Bajaj)  
Chairman

Application Form No.:

FATCA/CRS Details for non-Individual Applicants (mandatory)

Name of the entity

Type of address given at KYC: Residential or Business Residential Business Registered Office

Note: "Address of tax residence would be taken as available in KRA (KYC Registration Agency) database. In case of any change, please approach KRA & notify the changes"

Date of incorporation: PAN City of incorporation Country of incorporation

Entity Constitution Type: Partnership Firm HUF Society AOP/BOI Trust Liquidator Limited Liability Partnership Artificial Juridical Person Others specify

Please tick the applicable tax resident declaration - Is "Entity" a tax resident of any country other than India? Yes No

If 'yes', please fill below details for all countries (other than India) in which the entity is a resident for tax purposes as well as Ultimate Beneficiary Ownership (UBO) declaration on the next page

Country of tax residency	Tax Identification number or functional equivalent	Identification type (TIN or other, please specify)*

\*In case TIN or its functional equivalent is not available, please provide Company Identification number or Global Entity Identification Number or GIIN, etc.

In case the Entity's Country of Incorporation / Tax residence is U.S. but Entity is not a Specified U.S. Person, mention Entity's exemption code here

FATCA & CRS Declaration (Please consult your professional tax advisor for further guidance on FATCA & CRS classification)

PART A [to be filled by Financial Institutions or Direct Reporting Non-Financial Entities (NFEs)]

We are a: Financial institution OR Direct reporting NFE	GIIN (consists of 19 characters) Note: If you do not have a GIIN but you are sponsored by another entity, please provide your sponsor's GIIN above and indicate your sponsor's name below Name of sponsoring entity
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If GIIN not available and If the entity is a financial institution(tick whichever is applicable): Not required to apply for Not obtained - Non-participating FI

PART B (please fill any one as appropriate "to be filled by NFEs other than Direct Reporting NFEs")

1.	Is the Entity an active NFE	Yes (If yes, please fill UBO declaration in the next section.) No Nature of Business
2.	Is the Entity a passive NFE	Yes (If yes, please fill UBO declaration in the next section.) No Nature of Business

**Ultimate Beneficiary Ownership (UBO) declaration (to be filled by a non-individual tax resident of any country other than India)**

Name of the entity .....

Entity Constitution Type: Partnership Firm ☐ HUF ☐ Society ☐ AOP/BOI ☐ Trust ☐ Liquidator ☐  
Limited Liability Partnership ☐ Artificial Juridical Person ☐ Others specify:.....

Please list below the details of controlling person(s), confirming ALL countries of tax residency / permanent residency / citizenship and ALL Tax Identification Numbers for EACH controlling person(s):

1.	Name of Beneficial owner / Controlling person..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Tax ID Type (TIN or Other, please specify)..... Beneficial Interest %..... Address type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/>	Address - Include State, Country, PIN / ZIP Code & Contact Details: ..... .....
2.	Name of Beneficial owner / Controlling person..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Tax ID Type (TIN or Other, please specify)..... Beneficial Interest %..... Address type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/>	Address - Include State, Country, PIN / ZIP Code & Contact Details: ..... .....
3.	Name of Beneficial owner / Controlling person..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Tax ID Type (TIN or Other, please specify)..... Beneficial Interest %..... Address type: Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office <input type="checkbox"/>	Address - Include State, Country, PIN / ZIP Code & Contact Details: ..... .....

If passive NFE, please provide below additional details  
(to be filled by controlling persons with tax residency / permanent residency / citizenship / Green Card in any country other than India):

1.	PAN, Aadhar, Passport, Election ID, Govt. ID, Driving Licence, NREGA Job Card, Others..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Occupation Type - Service, Business, Others..... Nationality..... Father's Name* .....	Date of birth..... Gender: Male <input type="checkbox"/> Female <input type="checkbox"/> Other <input type="checkbox"/>
2.	PAN, Aadhar, Passport, Election ID, Govt. ID, Driving Licence, NREGA Job Card, Others..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Occupation Type - Service, Business, Others..... Nationality..... Father's Name* .....	Date of birth..... Gender: Male <input type="checkbox"/> Female <input type="checkbox"/> Other <input type="checkbox"/>
3.	PAN, Aadhar, Passport, Election ID, Govt. ID, Driving Licence, NREGA Job Card, Others..... Country of Tax residency..... Tax ID No. - Or functional equivalent for each country.....	Occupation Type - Service, Business, Others..... Nationality..... Father's Name* .....	Date of birth..... Gender: Male <input type="checkbox"/> Female <input type="checkbox"/> Other <input type="checkbox"/>

\*Mandatory if PAN is not available

Certification:

I / We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) 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 and understood the FATCA & CRS Terms and Conditions below and hereby accept the same.

Signature of first applicant

Signature of joint applicant

Signature of joint applicant



Customer ID:

Application Form No.:

'FORM NO. 15G'

[See section 197A(1), 197A(1A) and rule 29C]

Declaration under section 197A (1) and section 197A(1A) to be made by an individual or a person  
(not being a company or firm) claiming certain incomes without deduction of tax.

PART I

1. Name of Assessee (Declarant) ..... 2. PAN of the Assessee .....
- First Middle Last
3. Status ..... 4. Previous year (P.Y.) ..... 5. Residential Status .....
- (for which declaration is being made)
6. Flat/Door/Block No. .... 7. Name of Premises .....
8. Road/Street/Lane ..... 9. Area/Locality .....
10. Town/City/District ..... 11. State ..... 12. PIN ..... 13. Email .....
14. Telephone No. (with STD Code) and Mobile No. ....
15. Whether assessed to tax under the Income-tax Act, 1961 ☐ Yes ☐ No If yes, latest assessment year for which assessed
16. Estimated income for which this declaration is made .....
17. Estimated total income of the P.Y. in which income mentioned in column 16 to be included .....
18. Details of Form No. 15G other than this form filed during the previous year, if any
- Total no. of Form No. 15G filed ..... Aggregate amount of income for which Form No. 15G filed .....
19. Details of income for which the declaration is filed

Sr. no.	Identification number of relevant investment/account, etc.	Nature of income	Section under which tax is deductible	Amount of income
1		Fixed Deposit Interest	194 A	
2		Fixed Deposit Interest	194 A	
3		Fixed Deposit Interest	194 A	
4		Fixed Deposit Interest	194 A	

20. Declaration/Verification

Signature of the Declarant

\*I/We ..... do hereby declare that to the best of \*my/our knowledge and belief what is stated above is correct, complete and is truly stated. \*I/We declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. \*I/We further declare that the tax \*on my/our estimated total income including \*income/incomes referred to in column 16 \*and aggregate amount of \*income/incomes referred to in column 18 computed in accordance with the provisions of the

Income-tax Act, 1961, for the previous year ending on 31.03..... relevant to the assessment year 20.....-20..... will be nil. \*I/We also declare that \*my/our \*income/incomes referred to in column 16 \*and the aggregate amount of \*income/incomes referred to in column 18 for the previous year ending on 31.03..... relevant to the assessment year 20.....-20..... will not exceed the maximum amount which is not chargeable to income-tax.

Place .....

Date .....

Signature of the Declarant

\*Delete whichever is not applicable

Application Form No.:

PART II

[To be filled by the person responsible for paying the income referred to in column 16 of Part I]

Name of the person responsible for paying **BAJAJ FINANCE LIMITED**

Unique Identification No. ....

PAN of the person responsible for paying **AACB1518L**

Complete Address: **4TH FLOOR, BAJAJ FINSERV CORPORATE OFFICE, OFF PUNE AHMEDNAGAR ROAD, VIMAN NAGAR, PUNE - 411014**

TAN of the person responsible for paying: **PNEB00001B**

Email ID ..... Telephone No. (with STD Code) and Mobile No. **020-30405060** Amount of income paid **Gross Interest for FY**

Date on which Declaration is received 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

 Date on which the income has been paid/credited (DD/MM/YYYY) 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Place .....

Date .....

Signature of the Declarant .....

As per provisions of section 206AA(2), the declaration under section 197A(1) or 197A(1A) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN). Declaration can be furnished by an individual under section 197A(1) and a person (other than a company or a firm) under section 197A(1A).

1. Enter the name of the declarant
2. Enter the PAN of the declarant
3. Tick whichever status is applicable
4. The financial year to which the income pertains.
5. Please mention the residential status as per the provisions of section 6 of the Income-tax Act, 1961.
- 6-14. Enter residential address and contact details
15. Please mention 'Yes' if assessed to tax under the provisions of Income-tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
16. Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made.
17. Enter income from all sources, including income filled in 16. above
18. In case any declaration(s) in Form No. 15G is filed before filing this declaration during the previous year, mention the total number of such Form No. 15G filed along with the aggregate amount of income for which said declaration(s) have been filed.
19. Mention the distinctive number of shares, account number of term deposit, recurring deposit, National Savings Schemes, life insurance policy number, employee code, etc.
20. Indicate the capacity in which the declaration is furnished on behalf of a HUF, AOP, etc.

Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income-tax Act, 1961 and on conviction be punishable-

- a. In a case where tax sought to be evaded exceeds twenty-five lakh rupees, with rigorous imprisonment which shall not be less than six months but which may extend to seven years and with fine;
- b. In any other case, with rigorous imprisonment which shall not be less than three months but which may extend to two years and with fine.

The person responsible for paying the income referred to in column 16 of Part I shall allot a unique identification number to all the Form No. 15G received by him during a quarter of the financial year and report this reference number along with the particulars prescribed in rule 31A(4)(vii) of the Income-tax Rules, 1962 in the TDS statement furnished for the same quarter. In case the person has also received Form No.15H during the same quarter, please allot separate series of serial number for Form No. 15G and Form No. 15H.

The person responsible for paying the income referred to in column 16 of Part I shall not accept the declaration where the amount of income of the nature referred to in sub-section (1) or sub-section (1A) of section 197A or the aggregate of the amounts of such income credited or paid or likely to be credited or paid during the previous year in which such income is to be included exceeds the maximum amount which is not chargeable to tax. For deciding the eligibility, he is required to verify income or the aggregate amount of incomes, as the case may be, reported by the declarant in columns 16 and 18.

Customer ID:

Application Form No.:

'FORM NO. 15H'

[See section 197A(1), 197A(1A) and rule 29C]

Declaration under section 197A(1C) to be made by an individual who is of the age of sixty years or more claiming certain incomes without deduction of tax.

PART I

1. Name of Assessee (Declarant) ..... 2. PAN of the Assessee .....
- First Middle Last
3. Date of Birth 

D	D	M	M	Y	Y	Y	Y
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 4. Previous year (P.Y.) ..... 5. Flat/Door/Block No. ....
- (for which declaration is being made)
6. Name of Premises .....
7. Road/Street/Lane ..... 8. Area/Locality .....
9. Town/City/District ..... 10. State ..... 11. PIN ..... 12. Email .....
13. Telephone No. (with STD Code) and Mobile No. ....
14. Whether assessed to tax ☐ Yes ☐ No If yes, latest assessment year for which assessed .....
15. Estimated income for which this declaration is made .....
16. Estimated total income of the P.Y. in which income mentioned in column 15 to be included .....
17. Details of Form No. 15H other than this form filed for the previous year, if any
- Total No. of Form No. 15H filed ..... Aggregate amount of income for which Form No. 15H filed .....
18. Details of income for which the declaration is filed

Sr. no.	Identification number of relevant investment/account, etc.8	Nature of income	Section under which tax is deductible	Amount of income
1		Fixed Deposit Interest	194 A	
2		Fixed Deposit Interest	194 A	
3		Fixed Deposit Interest	194 A	
4		Fixed Deposit Interest	194 A	

Declaration/Verification

.....  
Signature of the Declarant

\*I/We ..... do hereby declare that to the best of \*my/our knowledge and belief what is stated above is correct, complete and is truly stated. \*I/We declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. \*I/We further declare that the tax \*on my/our estimated total income including \*income/incomes referred to in column 16 \*and aggregate amount of \*income/incomes referred to in column 18 computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31.03..... relevant to the assessment year 20.....-20..... will be nil. \*I/We also declare that \*my/our \*income/incomes referred to in column 16 \*and the aggregate amount of \*income/incomes referred to in column 18 for the previous year ending on 31.03..... relevant to the assessment year 20.....-20..... will not exceed the maximum amount which is not chargeable to income-tax.

Place .....

Date .....

.....  
Signature of the Declarant

Application Form No.:

PART II

[To be filled by the person responsible for paying the income referred to in column 16 of Part I]

Name of the person responsible for paying **BAJAJ FINANCE LIMITED**

Unique Identification No. ....

PAN of the person responsible for paying **AABCB1518L**

Complete Address: **4TH FLOOR, BAJAJ FINSERV CORPORATE OFFICE, OFF PUNE AHMEDNAGAR ROAD, VIMAN NAGAR, PUNE - 411014**

TAN of the person responsible for paying: **PNEB00001B**

Email ..... Telephone No. (with STD Code) and Mobile No. **020-30405060** Amount of income paid **Gross Interest for FY**

Date on which Declaration is received 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

 Date on which the income has been paid/credited (DD/MM/YYYY) 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Place .....

Date .....

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Signature of the Declarant

As per provisions of section 206AA(2), the declaration under section 197A(1C) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN). Declaration can be furnished by a resident individual who is of the age of 60 years or more at any time during the previous year.

1. Enter the name of the declarant
2. Enter the PAN of the declarant
3. Enter the date of birth of the declarant
4. The financial year to which the income pertains.
- 5-13. Enter residential address and contact details
14. Please mention 'Yes' if assessed to tax under the provisions of Income-tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
15. Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made.
16. Enter income from all sources, including income filled in 15. above
17. In case any declaration(s) in Form No. 15H is filed before filing this declaration during the previous year, mention the total number of such Form No. 15H filed along with the aggregate amount of income for which said declaration(s) have been filed.
18. Mention the distinctive number of shares, account number of term deposit, recurring deposit, National Savings Schemes, life insurance policy number, employee code, etc.

Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income-tax Act, 1961 and on conviction be punishable-

- a. In a case where tax sought to be evaded exceeds twenty-five lakh rupees, with rigorous imprisonment which shall not be less than six months but which may extend to seven years and with fine;
- b. In any other case, with rigorous imprisonment which shall not be less than three months but which may extend to two years and with fine.

The person responsible for paying the income referred to in column 15 of Part I shall allot a unique identification number to all the Form No. 15H received by him during a quarter of the financial year and report this reference number along with the particulars prescribed in rule 31A(4)(vii) of the Income-tax Rules, 1962 in the TDS statement furnished for the same quarter. In case the person has also received Form No.15G during the same quarter, please allot separate series of serial number for Form No.15H and Form No.15G.

The person responsible for paying the income referred to in column 15 of Part I shall not accept the declaration where the amount of income of the nature referred to in section 197A(1C) or the aggregate of the amounts of such income credited or paid or likely to be credited or paid during the previous year in which such income is to be included exceeds the maximum amount which is not chargeable to tax after allowing for deduction(s) under Chapter VI-A, if any, or set off of loss, if any, under the head "income from house property" for which the declarant is eligible. For deciding the eligibility, he is required to verify income or the aggregate amount of incomes, as the case may be, reported by the declarant in columns 15 and 17."