



For MFPF Plans and Takaful Coverage Details

Life ko Plan karo...
Aaj se!

Pure. Profit.

Day	Month	Year

Portfolio No.	
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NOTE: ALL FIELDS IN THE FORM ARE MANDATORY

Name (as per CNIC) Mr. / Ms. / M/s:	
Contact No.:	

Selection of Plan (Please tick the appropriate Plan)

Education Savings Plan
 Wedding Savings Plan
 Home Builder Plan
 Hajj Savings Plan

Allocation Scheme

Aggressive
 Moderate
 Conservative

Plan Maturity and Term

Date of first investment		Term of Plan (min 3 years / max 18 years)
Plan Maturity Date		

Investment Details

Initial Investment amount		Investment amount in words
Date	Cheque Number	Bank Name
		Branch
Subsequent Investment amount		Investment amount in words

Frequency of payment
 Monthly
 Quarterly
 Semi-annually
 Annually

Mode of payment

Standing Instruction from attached (SIP)
 Standing instruction to the employer to debit contribution from salary and credit in favor of scheme
 Post dated cheques based on frequency of contribution

Number of cheques		Amount per cheque (Rs.)	
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Declaration And Specimen Signature of Account Holder.

I/We hereby confirm to all information provided in this form is true and correct to the best of my knowledge. I also confirm having read and understood the Trust Deeds, Offering Documents, Supplement Trust Deeds, and Supplemental Offering Documents that govern the transactions and further acknowledge understanding of the risks involved in mutual fund. I give my consent to the deduction of Takaful premium through redemption from my MFPF account every month or at a frequency mutually agreed between Al Meezan Investments and the Takaful Company. Further, I consent to rate revisions by the Takaful Company in view of internal company policies or changes in market dynamics.

Signatures of Principal Account Holder

Note: Takaful coverage is subject to applicable terms & conditions and submission of all required documents. Further, coverage shall initiate subsequent to the clearance by the Takaful Company as per their underwriting criteria.

For Office Use only

Information Regarding Takaful Coverage

Takaful initiation date	
Takaful coverage amount (Rs.)	Current applicable Takaful rate

Application Check List
 Account Opening Form for individual (for New Investor)
 Health Declaration Form

Conversion Form (in case of conversion from other funds/plans)
 SIP Form



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Form Received By	Name and Signatures of Reporting Agent	Order Authorized By
Signature and Stamp of Distributor	Reporting Date	Signature & Stamp of Transfer Agent
	Order Number	

TITLES FOR AL MEEZAN FAMILY OF FUNDS

NOTE: DETAILS OF NAME OF FUNDS, TYPE OF FUNDS AND ACCOUNT PAYEE TITLE

Meezan Financial Planning Fund of Funds-Plans	Allocation Scheme		ACCOUNT PAYEE TITLE
	MIF (Equity)	MSF (Income)	
Meezan Financial Planning Fund of Funds (MFPF) Aggressive Allocation Plan	65%*	25%*	CDC Trustee MFPF Aggressive Allocation Plan
Meezan Financial Planning Fund of Funds (MFPF) Moderate Allocation Plan	45%*	45%*	CDC Trustee MFPF Moderate Allocation Plan
Meezan Financial Planning Fund of Funds (MFPF) Conservative Allocation Plan	20%*	70%*	CDC Trustee MFPF Conservative Allocation Plan

*Minimum Allocation

TAKAFUL RATE SCHEDULE

Below is the applicable age-based Takaful Schedule according to which Takaful deductions shall be made from the investor's account:

Age-band	Rate per 1,000 of Takaful Sum
18 - 25	0.56
26 - 30	0.80
31 - 35	1.11
36 - 40	1.59
41 - 45	2.45
46 - 50	4.38
51 - 55	9.98