

Change of Registered Guardian Request Form



SUNDARAM MUTUAL

Folio Number(s)	Sole/First Unit Holder	Second Unit Holder	Third Holder
Minor's Name:			
Existing Registered Guardian's Name:			

I request Sundaram Mutual Fund to change the registered Guardian under the above mentioned Folio no. Please find details of the new Guardian as mentioned below.

1. New Guardian Details (Refer Instruction 1)

Name			
Relationship with Minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Others <input type="checkbox"/> Court Appointed Legal Guardian		
PAN & KYC Letter (Mandatory)	PAN		<input type="checkbox"/> Yes, I am submitting a KYC Letter
Communication Address	<input type="checkbox"/> New address to be updated from KYC Letter attached.		
Reason for Change [Please (✓) one]	<input type="checkbox"/> Demise of Existing Guardian	<input type="checkbox"/> By Mutual Consent	<input type="checkbox"/> Court Order
Mandatory Documents as per request	<input type="checkbox"/> Copy of Death Certificate (duly notarized or attested by bank manager or AMC official) <input type="checkbox"/> Self-Attested Copy of Relationship Proof of Minor with New Guardian.	<input type="checkbox"/> Consent / No Objection Letter (NOC) from existing registered guardian (point 5 below). <input type="checkbox"/> Self-Attested Copy of Relationship Proof of Minor with New Guardian.	<input type="checkbox"/> Court Order for appointing new guardian, copy duly notarized.

2. Go Green Services (Save The Future): Please provide Contact Details of First / Sole Applicant

E-Mail																			
STD				Telephone															

I/We would like to receive Account Statements, Annual Reports and other information by email and SMS updates on mobile Yes No

3. Go Green I-PIN Services (Refer Instruction 3) [Please (✓)]

Existing investor can register their IPIN (Internet Personal Identification Number) online in 3 Simple Steps by visiting us at www.sundarambnparibasf.in. With this you can access your account statement/capital gain statement 24x7, view your portfolio and transact online, receive transactional alerts by email/SMS and subscribe for daily NAV alerts. Applicants who request a Personal Identification Number (PIN) will be deemed to have read, understood and agreed to the terms and conditions for the PIN available at www.sundarammutual.com.

4. Existing Bank A/C of Minor where new guardian is appended (OR) New Guardian's Bank A/C Details: (Refer Instruction 4) Please enclose an original cancelled cheque leaf / passbook wherein the bank account number and mutual fund first holder name are printed (Mandatory) or a copy of the same attested by your current banker.

Bank Name		Bank Branch & City	
Account No.		Account Type	
MICR Code*		IFSC/RTGS Code*	

*(9-digit number next to your cheque number)

(*11 character code printed on a cheque / passbook)

Mandatory Bankers Attestation / Bankers Letter (In Case Minor's existing Bank A/C is appended with New Guardian)

Name of the Banker:	Signature with Bank's Seal:
Designation:	
Employee Code:	

5. Signature of the Existing Guardian: Consent / No Objection (NOC) (Mandatory Field)

I, being the existing registered guardian of minor in the folio number(s), details as mentioned above, hereby give my consent and have NO Objection and will not hold the Fund/AMC/RTA towards any liability by registering a new guardian for the minor's folio(s) as mentioned above.

Signature of Existing Guardian

Signature of the NEW Guardian (Mandatory Field)

I hereby give my consent and will not hold the Fund/AMC/RTA towards any liability by registering myself as the new guardian for the minor's folio(s) as mentioned above.

New Guardian's Signature

Request Date.....

Place.....

Acknowledgement	Sundaram Mutual Fund
Received, subject to verification, request for change of registered guardian from:..... Folio No: (1) (2)..... (3)..... Checklist Mandatory documents: <input type="checkbox"/> KYC Letter <input type="checkbox"/> Proof of new Bank account details	Time Stamp & Signature

Please refer the instructions given below

Instruction 1

In case of Registration of PAN / KYC (Know Your Client), Mutual funds shall collect the following supporting documents:

- Self-attested PAN Copy in case of registration of PAN.
- Self-attested KYC acknowledgement copy in case of registration of KYC.

For those who are not KYC compliant, please refer the link http://www.sundarammutual.com/kyc_faqs/kyc_faqs.htm to download KYC forms and for FAQs

Instruction 2

Go Green E-Update Services: By providing details of your personal email address, you will receive your account statement by paperless mode via email, in an efficient and timely manner. You would also be contributing to the environment. The investor is deemed to be aware of security risks including interception of documents and availability of content to third parties. Sundaram Asset Management provides interesting information on the economy, markets and funds. If you wish to receive your account statement, annual report and other such updates by email, please fill in your email address overleaf. Further, by providing your mobile number, you can avail of instant SMS alerts for your transactions.

Instruction 3

Go Green Web Service Web/IPIN Services: Use Sundaram Mutual Go Green Services and get an I-PIN (Personal Identification Number) to transact online. You can keep track of your investment online at www.sundarammutual.com. To use this facility, you need to have a Unique Identification Number through Personal Identification Number (PIN) provided by Sundaram BNP Paribas Fund Services Limited, the Registrar. Choose 'Yes' to avail this facility and also make a further contribution towards the environment by helping conserve paper and trees. Applicants who request a Personal Identification Number (PIN) by ticking the 'Yes' box will be deemed to have read understood and agreed to the terms and conditions for the PIN that are available at www.sundarammutual.com. If you are an existing investor and wish to transact online without an IPIN, please register online by visiting www.sundarammutual.com.

Instruction 4

Original of any one of the following documents may be submitted, or produced for verification, or copy of the same attested by the Bank:

- Cancelled original cheque of the new bank mandate with first unit holder name and bank account number printed on the face of the cheque.
- Self-attested copy of bank statement
- Bank passbook with current entries not older than 3 months
- Bank Letter duly signed by branch manager / authorized personnel