

Change of Signature / Name Request Form for Individual



SUNDARAM MUTUAL

1. Unit Holder Details :			
Folio Number(s)	Sole/First Unit Holder	Second Unit Holder	Third Holder
Name of the sole/First Unit Holder:			
Name of the sole/First Unit Holder:			
Status of First / Sole Applicant [Please ✓]:			
<input type="checkbox"/> Individual	<input type="checkbox"/> Minor through guardian Body	<input type="checkbox"/> HUF	<input type="checkbox"/> Partnership
<input type="checkbox"/> Company	<input type="checkbox"/> Corporate	<input type="checkbox"/> Trust	<input type="checkbox"/> Mutual Fund
<input type="checkbox"/> NRI-Repatriable	<input type="checkbox"/> NRI-Non-Repatriable	<input type="checkbox"/> FII/Sub account of FII	<input type="checkbox"/> QFI
			<input type="checkbox"/> Society/Club
			<input type="checkbox"/> Fund of Funds in India
			<input type="checkbox"/> Others (please specify).....

2. Request For [Please ✓]	Change of Signature	Change of Name Holder
Mandatory documents as per request	<input type="checkbox"/> Banker's attestation/letter of new signature (refer point number 6).	<input type="checkbox"/> Self Attested KYC Letter in new name. <input type="checkbox"/> Self Attested PAN card copy in new name. <input type="checkbox"/> Attested copy of Marriage certificate/Divorce Deed/Press Release. <input type="checkbox"/> Valid photo identity proof (for PAN exempt cases only).

Note: Please produce originals for verification, if copies are not attested by Notary/Gazetted Officers/Bank Managers/Indian Embassy/Consulate General. The Fund House and the RTA reserve a right to call the customer for any additional documents or in-person verification (refer point 6) and keeps this request pending.

3. Bank Account Details for verification		Date of Bank Account Opening	
		D	M
		Y	Y
		Y	Y
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)

4. Old & New Names of unit holders and New Specimen Signatures:
I/we request Sundaram Mutual Fund (the fund) to update new name/s and/or signature/s and various records in the folio/s as per details mentioned above & below. I/we hereby agree that new name/s and/or signature/s will be valid and effective only after the changes are updated and a confirmation is received by me/us. After the new name/signature updation, any requests with old names/signatures will not be honoured by the fund.

	Sole/First Unit Holder	Second Unit Holder	Third Holder
Old Name/s	Old name for records	Old name for records	Old name for records
New Name/s	New name for records	New name for records	New name for records
New Signature/s	New Specimen Signature	New Specimen Signature	New Specimen Signature

5 <input type="checkbox"/> Bankers Attestation of Customer's Signature & Bank Account Details	
Name of the Banker:	Signature with Bank's Seal:
Designation:	
Employee Code:	

6. IPV Section (For office Use) (In case the Fund House/R&T feels the need for IPV as an additional verification procedure)	
<input type="checkbox"/> Verification with PAN Card/Photo Identification Proof PAN Card/Photo <input type="checkbox"/> Signed in official's presence <input type="checkbox"/> Sign matches with signature on Bank attestation	Name:..... Designation:..... Organization:..... Employee No:..... Location:..... Date of IPV:..... Official signature, with Company Seal

Request Date..... Place.....

Acknowledgement (To be filled in by the investor) Change of Signature/Name	Sundaram Mutual Fund
Received, subject to verification, request for change of Signature/Name from:.....	
Folio No: (1) (2)..... (3).....	Time Stamp & Signature