

SERVICE REQUEST FORM



SUNDARAM MUTUAL

Folio Number

Name of the First Unit Holder*

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You can now opt for electronic payment through NEFT and enjoy hassle free receipt of payments. Register your IFS Code and core banking account number with us to avail this facility. Please contact 1860 425 7237 for more details.

Redemption request submitted along with change of bank mandate would result in payment being withheld upto 10 days for validating new bank mandate.

1. Change of Bank Mandate (Refer Instruction 1)

Old Bank Details

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

New Bank Details

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)

2. Change of Address (Refer Instruction 2)

Address 1	Address 2
Address 3	City & PIN*

3. Go Green Services: To Update Contact Details (Refer Instruction 3)

E-Mail																										
STD		Telephone																								

By providing the details above, I confirm that I wish to receive the account statement, annual report and other correspondence by email and receive SMS updates on mobile.

4. Nomination (Refer Instruction 4)

Mandatory to fill in all fields. Proportion (%) in which units will be shared by each nominee should aggregate to 100%. In case of single nominee default proportion will be 100%.

I wish to nominate the following person(s)

<p>1st Nominee Name:..... Relationship:..... Address:..... Proportion (%)* in which units will be shared by first nominee.....% If nominee is a minor: Date of birth:..... Name of Guardian:..... Address of Guardian:.....</p>	<p>2nd Nominee Name:..... Relationship:..... Address:..... Proportion (%)* in which units will be shared by first nominee.....% If nominee is a minor: Date of birth:..... Name of Guardian:..... Address of Guardian:.....</p>	<p>3rd Nominee Name:..... Relationship:..... Address:..... Proportion (%)* in which units will be shared by first nominee.....% If nominee is a minor: Date of birth:..... Name of Guardian:..... Address of Guardian:.....</p>
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5. To Register PAN & KYC linking (Refer instruction 5)

Permanent Account Number (PAN)*

First/Sole Applicant/Guardian																																							
Second Applicant																																							
Third Applicant																																							

Central KYC Number

CKYC Proof attached (Mandatory)

KYC updated (Please tick ✓): 1st Holder / Guardian: Yes No 2nd Holder Yes No 3rd Holder Yes No

Declaration: I/We hereby declare that all the particulars given herein are true, correct and complete to the best of my/our knowledge and belief. I/We agree to notify Sundaram Mutual Fund / Sundaram Asset Management Company Limited immediately in the event the information in the self-certification changes. I/ We further agree not to hold Sundaram Asset Management, its sponsor, their employees, authorised agents, service providers, representatives of the distributors liable for any consequences/losses/costs/damages in case of any of the above particulars being false, incorrect or incomplete or in case of my/our not intimating/delay in intimating any changes to the above particulars. I/We hereby authorise Sundaram Asset Management to disclose, share, remit in any form, mode or manner, all/any of the information provided by me/ us, including all changes, updates to such information as and when provided by me/us, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities, other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same.

First Holder	Second Holder	Third Holder

Request Date.....

Place.....

Acknowledgement

Folio Number

Received From Mr./Mrs./Ms.

- Change of Bank Mandate
- Change of Address - For Non-KYC folios only
- Go Green Services: To Update Contact Details
- Nomination
- To Register PAN & KYC linking

Request Date

Time Stamp/Seal

Contact No. 1860 425 7237 (India) +91 44 2831 0301 (NRI)

SMS SFUND to 56767

E-mail customerservices@sundarammutual.com

Please refer the instructions given below

Instruction 1

For Change of Bank Mandate the investor should submit:

Existing Bank details# (any one of the below)	New Bank Details (any one of the below)
(1) Cancelled original cheque (bearing account number and name on the face of the cheque); (2) Original Bank statement; or (3) Old Bank passbook with entries for 3 months prior to closure date; or (4) Original letter by the existing Bank on their letter head duly signed and stamped by branch manager/authorised officials; or (5) In case such bank account is already closed, a duly signed and stamped original letter from the bank confirming the closure of bank account. (copy enclosed)	(1) Cancelled original cheque of the new bank account with name and account number printed thereon; (2) Self-attested copy of bank statement; (3) Bank passbook with current entries not older than 3 months; (4) Original letter by the Bank on their letter head duly signed and stamped by branch manager/authorised officials.

In case of non-availability of any of these documents, a self-attested copy of the bank pass book or a statement of bank account with entries for latest 3 months prior to the closure and having the name and address and account number will be required; In addition, the investor should provide a self attested copy of any one of the ID proof with address viz. PAN, Passport, driving license etc.

In case of non-availability of above documents and self-attested copy of pass book or statement of bank account, investor should give declaration. Please download the Declaration form from our website https://www.sundarammutual.com/pdf2/2018/App_form/COB_Declaration.pdf

Remarks:

- Separate forms needs to be filled for separate folios of the investor.
- In the event of a request for change in bank account information being invalid/incomplete/ not satisfactory in respect of signature mismatch/document insufficient/not meeting any requirement more specifically as indicated in clauses, the request will be liable for rejection.

Cooling Period

Cooling period of 10 days shall be applicable whenever any change of bank mandate and/or change of address is received/processed prior to submission of redemption request or on the same day as a standalone change request.

Instruction 2

KYC/CKYC Complied Folios / Clients

In case of change of address for KYC complied Folios, Mutual Fund Intermediaries shall collect the following supporting documents:

- Submit duly filled in CKYC form
- KYC Change details form for Individuals/Non-Individuals.
- Self attested copies of proof of new address* (POA) and PAN accompanied by the originals for verification. In case the original of any document is not produced for verification, then the copies should be properly attested by entities authorised for attesting the documents as under: <http://www.sundarammutual.com/kycdwn/kycdwn.htm>
- Any Other document / form that the KRA may specify from time to time.

*Not more than 3 months old

Instruction 3

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 4

Please indicate a nominee who should be entitled to the benefits of your investment in the event of an untoward development. Where a folio has joint holders, all holders should sign the request for nomination even if the mode of holding is not "joint." Every new nomination for a folio/account will overwrite the existing nomination. Nomination is not applicable in case of non-individuals or when the account/folio is held on behalf of a minor. Nomination forms cannot be signed by Power of Attorney Holders.

Instruction 5

In case of Registration of PAN / KYC, Mutual funds shall collect the following supporting documents:

- Self attested PAN Copy in case of registration of PAN along with a written and duly signed request for registration of PAN
- Self attested KYC acknowledgement copy in case of registration of KYC.