

— Sundaram Finance Group —

Folio Number

[illegible]

1. Change of Bank Mandate (Refer Instruction 1)

Name of Bank	
Name of Branch	
Account No.	
Account Type	
City	
State	
Country	
Postal Code	
SWIFT Code	
IFSC Code	
IBAN Code	

2. To update Residential address (Refer Instruction 2)

New Residential address	
Address-1	
Address-2	
City:	State:
Postal Code:	Country

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

	E-Mail	Mobile
First/Sole Applicant/Guardian		
Second Applicant		
Third Applicant		

**Mandatory*

	E-Mail	Mobile
First/Sole Applicant/Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian
Second Applicant	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian
Third Applicant	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian

4. Change in Mode of Holding (Refer Instruction 4)

Please tick (✓) ☐ Anyone or survivor **OR** ☐ Joint Holding

Signature is mandatory

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Signature of Third Applicant

Place.....

Acknowledgement

Request Date

DD/MM/YYYY

Time Stamp/Seal

☐ To update contact Details ☐ Change in Mode of Holding ☐ Nominee Details ☐ Change of Bank Mandate ☐ Update Residential Address

5. Nomination Details (Refer Instruction 5)

Mandatory	I / we hereby appoint the person(s) mentioned below in whom all rights and/ or amount payable in respect of all my/ our investments made on my / our death.													
	☐ Register nomination as below													
1 st Nominee	Nominee Name													
	Relationship with Nominee		Date of Birth of Nominee	<table border="1"><tr><td>D</td><td>D</td><td>/</td><td>M</td><td>M</td><td>/</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	/	M	M	/	Y	Y	Y	Y
	D	D	/	M	M	/	Y	Y	Y	Y				
	Identity Type ☐ PAN ☐ Driving Licence ☐ Aadhaar ☐ Passport ☐ TIN		Identity Number (Only last 4 digits in case the Identity Type is Aadhaar)											
	Address			City										
	State	PIN		Country										
Guardian Name in case of Minor	Allocation (%)	Mobile No.	Email ID											
2 nd Nominee	Nominee Name													
	Relationship with Nominee		Date of Birth of Nominee	<table border="1"><tr><td>D</td><td>D</td><td>/</td><td>M</td><td>M</td><td>/</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	/	M	M	/	Y	Y	Y	Y
	D	D	/	M	M	/	Y	Y	Y	Y				
	Identity Type ☐ PAN ☐ Driving Licence ☐ Aadhaar ☐ Passport ☐ TIN		Identity Number (Only last 4 digits in case the Identity Type is Aadhaar)											
	Address			City										
	State	PIN		Country										
Guardian Name in case of Minor	Allocation (%)	Mobile No.	Email ID											
3 rd Nominee	Nominee Name													
	Relationship with Nominee		Date of Birth of Nominee	<table border="1"><tr><td>D</td><td>D</td><td>/</td><td>M</td><td>M</td><td>/</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	/	M	M	/	Y	Y	Y	Y
	D	D	/	M	M	/	Y	Y	Y	Y				
	Identity Type ☐ PAN ☐ Driving Licence ☐ Aadhaar ☐ Passport ☐ TIN		Identity Number (Only last 4 digits in case the Identity Type is Aadhaar)											
	Address			City										
	State	PIN		Country										
Guardian Name in case of Minor	Allocation (%)	Mobile No.	Email ID											

☐ I / We DO NOT wish to nominate.

Nomination Declaration: I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

	1 st Applicant Signature	2 nd Applicant Signature	3 rd Applicant Signature
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Please refer the instructions given below

Instruction 1 For Change of Bank Mandate the investor should submit (any one of the below):

- (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 2 months;
- (4) Original letter by the Bank on their letter head duly signed and stamped by branch manager/authorised officials

Remarks:

- a. Separate forms needs to be filled for separate folios of the investor.
- b. 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.

Instruction 2: Proof of new residential address to be provided.

List of documents accepted as proof: Utility bills (electricity, water, telephone landline) not older than 2 months, Bank Statement (not older than 2 months), Valid passbook, Registered Rent/Lease Agreement.

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.

Instruction 4: Applicable only if there are more than one applicant in the Folio. All unit holders need to sign irrespective of mode of holding.

Instruction 5: Please indicate a nominee who should be entitled to the benefits of your investment in the event of an untoward development. Nomination form can be signed by the unit holder(s) as per the mode of holding registered in the folio.

'Either or Survivor' / Any one or Survivor Folios - any one of the holders can sign and the signature should match with our records.

'First holder' Folios / Single - only First holder can sign and the signature should tally with our records 'Jointly' Folios - all holders have to sign and the signatures should tally with our records 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.

All supporting documents are required to be attested as per IFSCA guidelines.