SERVICE REQUEST FORM

SUNDARAM MUTUAL
Sundaram Finance Group

Folio Number	Name of the First Unit Holder* (Name as per PAN card)
	FIRST MIDDLE LAST

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	
IFSC/RTGS Code#			

New Bank Details

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

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

2. Go Green Services: To Update Contact Details *(Refer Instruction 2)*

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

Please tick the Family Code for the Mobile Number and Email ID provided* ****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

Default Communication mode is E-mail only, if you wish to receive following document(s) via physical mode:
Please tick (✓) ☐ Annual Report ☐ Other Statutory Information

3. To Register PAN & KYC *(Refer instruction 3)*

Name of First/Sole Applicant (Name as per PAN card)

FIRST MIDDLE LAST DOB/Date of Incorporation* D D M M Y Y Y Y

Permanent Account Number (PAN) **Central KYC Number**

Name of Second Applicant (Name as per PAN card)

FIRST MIDDLE LAST DOB* D D M M Y Y Y Y

Permanent Account Number (PAN) **Central KYC Number**

Name of Third Applicant (Name as per PAN card)

FIRST MIDDLE LAST DOB* D D M M Y Y Y Y

Permanent Account Number (PAN) **Central KYC Number**

Non-Profit Organization [NPO] Declaration

We are falling under "Non-Profit Organization" [NPO] which has been constituted for religious or charitable purposes referred to in clause (23) of section 2 of the Income-tax Act, 2025, and is registered as a trust or a society under the Societies Registration Act, 1860 (21 of 1860) or any similar State legislation or a Company registered under the section 8 of the Companies Act, 2013 (18 of 2013).	☐ Yes ☐ No
If yes, please quote Registration No. of Darpan portal of Niti Aayog	

If not, please register immediately and confirm with the above information. Failure to get above confirmation or registration with the portal as mandated, wherever applicable will force MF / AMC to register your entity name in the above portal and may report to the relevant authorities as applicable. We am/are aware that we may be liable for it for any fines or consequences as required under the respective statutory requirements and authorize you to deduct such fines/charges under intimation to me/us or collect such fines/charges in any other manner as might be applicable.

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

Please tick (✓) ☐ Anyone or Survivor OR ☐ Joint Holding

Signature is mandatory
Signature of Sole / First Applicant / Guardian

Signature is mandatory
Signature of Second Applicant

Signature is mandatory
Signature of Third Applicant

Request Date.. Place..

Acknowledgement

Folio Number

Request Date D D M M Y Y Y Y

Time Stamp/Seal

Received From Mr./Mrs./Ms. ....

☐ Change in Mode of Holding ☐ Change of Bank Mandate
☐ Go Green Services: To Update Contact Details ☐ Nomination ☐ To Register PAN & KYC linking

5. Nomination Details *(Refer Instruction 5)*

Note: Updation of nomination in the folio is subject to the **investor's consent** through the link sent to the mobile number or email ID registered in the KYC/folio records.

☐ **I / We wish to nominate.** (Proportion (%) in which units will be shared by each nominee should aggregate to 100%. In case of single nominee default proportion will be 100%.)

Mandatory Details

Particulars	Nominee 1	Nominee 2	Nominee 3
Name of the Nominee			
Relationship			
Date of Birth#			

Mandatory only if the nominee is minor.
I/We want the details of my/our nominee to be printed in the statement of holding, provided to me/us by the AMC as follows (Please tick, as appropriate) ☐ Name of nominee(s) ☐ Nomination: Yes/No

Additional Details

Guardian Name (Optional)			
Allocation (%)**			
Mobile Number^			
E-mail^			
Identity Number***^ [Please tick any one and provide details of same]	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number

** if % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division / fraction of %, shall be transferred to the first nominee mentioned in the nomination form.
*** Investor can provide any one of the following as the identify number for the nominee(s), ***copy of the document is not required.*** • PAN • Driving License Number • Last 4 digits of Aadhaar • Passport Number
^ The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor. Please note that the MF RTA will be able to reach out to your nominee if you provide the contact details.

☐ **I / We DO NOT wish to nominate.**

Nomination Declaration: I hereby confirm that I do not wish to appoint any nominee(s) to my mutual fund folio at this point of time.
I understand that – **(i)** the nomination helps to quickly identify the person for transfer of securities and helps in faster and smoother transmission of my securities to my legal heir(s) after my demise. **(ii)** in the absence of a nomination, my legal heir(s) may require the submission of certain additional legal or court-issued documents which may delay the process of transmission of securities to my legal heir(s). **(iii)** if no claim is made on the account / folio for a prolonged period after my demise, the holdings may be treated as unclaimed assets and they may be transferred to Investor Education and protection Fund Authority (IEPF) in accordance with the applicable regulatory framework. I confirm that I have understood the above implications and that my decision to opt out of nomination is voluntary.

Name of First / Sole Applicant / Guardian	**Name of Second Applicant**	**Name of Third Applicant**
✍ **Signature of First / Sole Applicant / Guardian**	✍ **Signature of Second Applicant**	✍ **Signature of Third Applicant**

Signature of all the joint holders are required irrespective of mode of holding. Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature. Kindly fill the separate nomination form.

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; (3) Old Bank passbook with entries for 3 months prior to closure date; (4) Original letter by the existing Bank on their letter head duly signed and stamped by branch manager/authorised officials; (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 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

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.

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.

Cooling Period

Redemption pay-out will be processed after a 10 days cooling period whenever any change of bank mandate request is received simultaneously with, or just prior to submission of, a redemption request, as a matter of precaution against unauthorized/fraudulent transactions.

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. Further, by providing your mobile number, you can avail of instant SMS alerts for your transactions.

Instruction 3

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.

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. Signature of all the joint holders are required irrespective of mode of holding.

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.