SERVICE REQUEST FORM



SUNDARAM MUTUAL

Folio Number	Name of the First Unit Holder
You can now ont for electronic navment th	rough NEET and onion baselo from receipt of payments. Provider your IES Code and care banking account

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)

U		
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 - For Non-KYC folios only (Refer Instruction 2)

Address 1														A	ddre	ss 2	2		 	 	 	 	
Address 3								С	ty &	PI	N												
3. Go Green S	ervi	ces:	То	Upo	late	Con	tact	Det	tail	s (Re	efer	Inst	ruc	ction	3)								
E-Mail																							
STD					Те	lepł	none										Mob	ile					

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%.

\Box I wish to nominate the following person(s)		
1st Nominee	2nd Nominee	3rd Nominee
Name:	Name:	Name:
Relationship:	Relationship:	Relationship:
Address:	Address:	Address:
Proportion (%)* in which units will be shared by first	Proportion (%)* in which units will be shared by first	Proportion (%)* in which units will be shared by first
nominee%	nominee%	nominee%
If nominee is a minor:	If nominee is a minor:	If nominee is a minor:
Date of birth:	Date of birth:	Date of birth:
Name of Guardian:	Name of Guardian:	Name of Guardian:
Address of Guardian:	Address of Guardian:	Address of Guardian:

5. To Register PAN and KYC (*Refer instruction 5*)

First/Sole Applicant	Second Applicant	Third Applicant					
Permanent Account Number (PAN)	Permanent Account Number (PAN)	Permanent Account Number (PAN)					
Aadhar Card No.	Aadhar Card No.	Aadhar Card No.					
Central KYC Number	Central KYC Number	Central KYC Number					

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.

x	x	x
First Holder	Second Holder	Third Holder
 Request Date	Place	
I		

SERVICE REQUEST FORM



Please refer the instructions given below

Instruction 1

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.

Instruction 2

i) KYC Complied Folios / Clients

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

- 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/kycdwn/kycdwn/kycdwn/kycdwn/kycdwn/kycdwn/kycdwn.htm
- Any Other document / form that the KRA may specify from time to time.

*Not more than 3 months old

ii) KYC Not Complied Folios / Clients

In case of change of address for KYC Not Complied Folios, Mutual Funds shall collect the following supporting documents:

- Self-attested proof of new address (POA) and
- Self-attested Proof of Identity (POI): Only PAN card copy if PAN is updated in the folio, or PAN / other proof of identity if PAN is not updated in the folio.

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 nonindividuals 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.