# SERVICE REQUEST FORM



Folio Number Nai	me of the First Unit Holder	r		
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 Instr	ruction 1)			
Bank Name		Bank Branch & City		
Account No.		Account Type		
MICR Code*	de*		9*	
*(9-digit number next to your cheque number) (*11 character code printed on a cheque / passbook)				
2. Change of Address - For Non-KYC fol	lios only (Refer Instruction	n 2)		
Address 1	Address 2			
Address 3	City & PIN			
3. Go Green Services: To Update Contact Details (Refer Instruction 3)				
E-Mail				
-	Telephone Mobile			
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. Proport 100%. In case of single nominee defa	tion (%) in which units w ault proportion will be 10	ill be shared by 0 0%.	each nominee should aggregate to	
☐ I wish to nominate the following person(s)				
1st Nominee Name:	2nd Nominee Name:		3rd Nominee Name:	
Relationship:	Relationship:		Relationship:	
Proportion (%)* in which units will be shared by first nominee%	Proportion (%)* in which units will be shared by first nominee%		Proportion (%)* in which units will be shared by first nominee%	
If nominee is a minor: Date of birth:	If nominee is a minor:  Date of birth:		If nominee is a minor: Date of birth:	
	Name of Guardian:			
Name of Guardian:	l I		Name of Guardian:	
Address of Guardian:	Address of Guardian:			
Address of Guardian:	Address of Guardian:		Address of Guardian:	
Address of Guardian:	Address of Guardian:			
5. To Register PAN and KYC (Refer instr  First Holder / Guardian PAN	Address of Guardian:  Fuction 5)  Second Holder	r PAN	Address of Guardian:	
Address of Guardian:	Address of Guardian:	r PAN	Address of Guardian:	
To Register PAN and KYC (Refer instr  First Holder / Guardian PAN  Central KYC Number  KYC updated (Please tick ✓ ): 1st Holder  Declaration: I/We hereby declare that all the particulars given Sundaram Asset Management Company Limited immediately in their employees, authorised agents, service providers, representar or incomplete or in case of my/our not intimating/delay in intim form, mode or manner, all/any of the information provided by n	Address of Guardian:	r PAN  Imber  2nd Holder  Ye to the best of my/our know fication changes. I/ We fuequences/losses/costs/dar lars. I/We hereby authorisuch information as and	Third Holder PAN  Central KYC Number  Ses No 3rd Holder Yes No  Redge and belief. I/We agree to notify Sundaram Mutual Fund / rther agree not to hold Sundaram Asset Management, its sponsor, nages in case of any of the above particulars being false, incorrect see Sundaram Asset Management to disclose, share, remit in any when provided by me/us, to any Indian or foreign governmental	
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## 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: <a href="http://www.sundarammutual.com/kycdwn/kycdwn.htm">http://www.sundarammutual.com/kycdwn/kycdwn.htm</a>
- 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 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.