



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.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 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.