SERVICE REQUEST FORM



Fol	o Number			1	Name	of the	First U	Jnit	Hold	er												
1.	To Update Ba	ınk Deta	ils (Refe	r Insti	ructio	n 1) Ple	ase enc	close	an ori	ginal o	cancell	led ch	egue le	eaf/µ	assboo	ok wh	herei	n the l	bank	acco	unt i	number
and mutual fund first holder name are printed (Mandatory) or a copy of the same attested by your current banker.																						
Bank Name										Ba	nk Bra	anch	ty									
Ac	count No.										Account Type											
M	MICR Code*										IFSC/RTGS Code*											
*(9-	digit number nex	t to your c	heque nun	nber)						(*11	charac	ter co	de prii	nted o	on a ch	eque	/ pa.	ssbool	k)			
2.	Additional K	C Detai	ils (Mand	latory	y) (refe	er instr	uction	n 2)														
	□ Individual □	Non-Indivi	dual (Please	attach	mandate	ory Ultim	ate Ben	eficia	l Own	ership	(UBO)											
	Status of First/So					l Compai	ny		nlisted				ndividu		☐ Min			guard		ПН		
		Partnership									☐ Mutual Fund☐ Others					☐ FI		ecify)				
	Occupation Detail									Turius	III IIIUI	aЦC	ŹΠ			215				фіеа	se sp	echy)
	First Applicant		te Sector Ser			c Sector :			iovernr	nent S	ervice		usiness		☐ Prof	essior	nal			□ A	gricul	lturist
		Retired Housewife				☐ Student							☐ Others						ecify)			
	Second Applicant		te Sector Ser			c Sector :	Service			nent S	ervice		Business		☐ Prof		nal				~	lturist
					Housewife Public Sector Service							☐ Forex Dealer ☐ Business			☐ Others ☐ Professional						ecify) Iturist	
	тина Аррисанс				☐ Hous		JEI VICE		tudent	Helit 3	ervice		orex De				iai					ecify)
c.	Gross Annual Inco	ome (in ₹) [Please (🗸)]																	- 1		
	First Applicant \square Below 1 Lac \square 1-5 Lacs \square 5-10 Lacs \square 10-25 Lacs \square > 25 Lacs - 1 Crore \square > 1 Crore (or)																					
	Net-worth (Mandatory for nor Second Applicant ☐ Below 1 Lac ☐ 1-5 Lacs									7 > 25	as on				Not old rore (or							
	Second Applicant Third Applicant																					
	Third Applicant ☐ Below 1 Lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ > 25 Lacs - 1 Crore ☐ > 1 Crore (or) Net-worth ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐																					
	For Individuals [Please (✔)] Politically Exposed Person (PEP) Status (Also applicable for authorised signatories/Promoters/Karta/Trustee/Whole time Directors) □ I am PEP □ I am related to PEP □ Not Applica										cable											
	For Non-Individua												1. /5									
☐ Foreign Exchange/Money Changer Services ☐ Gaming/Gambling/Lot Second Applicant: (To be filled only if the applicant is an individual)								Pry/Casino Services ☐ Money Lendir ☐ Lam PEP ☐ Lam								one o				hlo		
Third Applicant: (To be filled only if the applicant is											☐ I am related t											
	Go Green Se							r Ins	truct	tion .	3)								'			
	E-Mail									Т						T	T					
	STD	$\overline{}$		Teleph	none							М	obile									
By	providing the detai	ls above, I c				e the acc	ount stat	temer	nt, annı	ual rep	ort and	other	corresp	onder	ice by e	mail a	and re	eceive	SMS ı	ıpdat	es on	mobile.
4.	Nomination	(Refer Ir	nstruction	n 4) _A	Mandato	orv to fil	l in all t	fields	. Pron	ortion	ı (%) i	n whi	ch unit	ts wil	l be sha	ared	bv ea	ach no	omine	e sh	ould	1
- •	aggregate to 10										. (/0/				, DC 5111		۵, د				o a.r.a	
	wish to nomina	te the follo	wing perso	on(s)																		
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Address of Guardian:												ess of Guardian:										
5.	To Register P.	AN and	KYC (Rei	fer in	struct	ion 5)																
			rdian PAN			Second Holder					PAN				Third Holder PAN							
KY	C updated (Pl	ease tick	✓)· 1st	Hold	ler / G	uardia	n· 🗆 \	Yes [∃ No	2nd	Hold	ler 🗆] Yes [¬ N	o 3rd	Hol	lder	□ Y _€	عد 🗆	No)	
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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

Additional KYC Details

In accordance with SEBI Circular No. CIR/MIRSD/13/2013dated December 26, 2013, the additional details viz. Occupation details, Gross Annual Income/networth and Politically Exposed Person (PEP) status mentioned under section 2(d) which was forming part of uniform KYC form will now be captured in the application form of the Fund. Also, the details of nature of services viz. Foreign Exchange/Gaming/Money Lending, etc., (applicable for first/sole applicant) is required to be provided as part of Client Due Diligence (CDD) Process of the Fund.

Politically Exposed Persons (PEP): PEPs are defined as individuals who are or have been entrusted with prominent public functions in a foreign country, e.g., Heads of States or of Governments, senior politicians, etc.

Ultimate Beneficial Owner: Pursuant to SEBI Master Circular No. CIR/ISD/AML/3/2010 dated December 31, 2010 on Anti Money Laundering Standards and to Guidelines on identification of Beneficial Ownership issued vide SEBI circular no. CIR/MIRSD/2/2013 dated January 24, 2013, investors (other than Individuals) are required to provide details of Ultimate Beneficial Owner(s) ('UBO'). The provisions w.r.t. Identification of UBO are not applicable to the investor or the owner of the controlling interest is a company listed on a stock exchange, or is a majority-owned subsidiary of such a listed company.(For more information on PEP & UBO please refer www.sundarammutual.com.

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.