SERVICE REQUEST FORM



Folio No														7																		
Name of the Fi	rst []	nit	Hold	der																												
1. To Update	Bank	c De	tails	s (R	efer	Inst	ruct	ion	1)					- 1									1	1	-							
Please encl holder nam	lose	an d	origi	inal	can	celle	ed c	heq	ue l															r an	d	mut	ual f	un	d fi	rst		
Bank Name															Bank Branch & City					ity												
Account No.														A	Account Type																	
MICR Code*													IF	IFSC/RTGS Code*																		
(9-digit number n	ext to	you	r che	eque	numł	per)		((*1	(*11 character code printed					nted on a cheque / passbook)												
2. Change of Address- For Non-KYC folios only (<i>Refer Instruction 2</i>) For KYC complied folios please submit the KYC Change details form along with self-attested copies of Proof of Address (not more than three months old) and PAN accompanied by the originals for verification.															ess																	
Address 1														A	Address 2																	
Address 3														0	City & PIN																	
3. Go Green Services: To Update Contact Details (<i>Refer Instru</i>														ctior	ion 3)																	
E-Mail											Τ				Τ														Τ			
STD		none								Mobi					ile																	
By providing the de	o rece	ceive the account statement, annual report and other corre									r corre	spon	denc	e by	ema	il and	recei	ive	SMS u	pdate	s on	mob	ile.									
 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%. I wish to nominate the following person(s) 																																
1st Nominee												2nd Nominee									3rd Nominee											
Name:	ame:										Name:								Nar	Jame:												
Address:										Address:							Ad					Address:										
Proportion (%) in v nominee If nominee is a mino Date of birth: Name of Guardian: Address of Guardiar	n li E	Proportion (%) in which units will nominee% If nominee is a minor: Date of birth:Relatio Name of Guardian:Address of Guardian:							onship: Date Nam					oportion (%) in which units will be shared by third minee% nominee is a minor: te of birth:Relationship: me of Guardian: dress of Guardian:																		
5. To Register PAN and KYC (<i>Refer instruction 5</i>)																																
First Ho		Second Holder PAN									Third Holder PAN																					
KYC updated (Pleas	se ti	ck 🗸): '	1st F	lold	er /	Gua	rdi	an: [□ '	Yes		lo 2n	d ⊦	lolo	der] Yes	5 🗆	No	3rc	H	olde	er 🗆	Ye	es 🗆	No					
Signature (Ma	ndat	ory	Fiel	ld)																												
\checkmark																																
		Second Holder										Third Holder																				

Please refer the instructions given below

Instruction 1

Original or 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/kyc
- 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.