



Redemption request submitted along with change of bank mandate would result in payment being withheld upto 10 days for validating new bank mandate.

Name of First/Sole Applicant (Please use capital Letters)

Grid for Name of First/Sole Applicant

Folio No

Grid for Folio No

Are you submitting a redemption request along with change of bank details. Yes No

Change of Bank Mandate (please refer check-list for supporting documents-Annexure 1)
Bank
Branch/Location
Account No
Account Type
RTGS/NEFT/IFSC
MICR No

Change of Address*/Contact Details (please refer check-list for supporting documents-Annexure 2)
Address:
PIN
Email:
Mobile No
*For non-KYC folios only! For those who are KYC compliant, please use the KYC change details form, and provide self-attested copy of proof of new address, and PAN card.

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document/addenda issued to the SID and KIM till date • hereby apply for units under the scheme(s) as indicated in the application form • agree to abide by the terms, conditions, rules and regulations of the scheme(s) • agree to the terms and conditions for Auto Debit • have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment • do not have any existing Micro SIPs/investments which together with the current application will result in the total investments exceeding Rs. 50,000 in a financial year or a rolling period of twelve months (applicable for PAN exempt category of investors). The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

Applicable to NRIs only: Please (✓) I/We confirm that I am/We are Non-Resident of Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channels or from funds in my/our Non-Resident External/Ordinary Account/FCNR Account on a Repatriation Basis Non-Repatriation Basis.

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 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 and other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

Signature
First / Sole Applicant / Guardian
Second Applicant
Third Applicant
Request Date

Acknowledgement Change of Bank Mandate Change of Address Request Date:

Folio No

Fund:

Toll Free: 1800 103 7237 (India)
+91 44 49057300 (NRI)

SMS SFUND to 56767

E-mail: customerservices@sundarammutual.com
(NRI): nriservices@sundarammutual.com

Change of Bank Documents Required-Annexure 1

Change of Bank Request (Standalone Request)

1] New bank account:

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

AND

2] Existing bank mandate currently registered (Optional, based on AMC's risk assessment):

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 with first unit holder name and bank account number printed on the face of the cheque.
- Original bank account statement / Pass book.
- Original letter issued by the bank on the letterhead confirming the bank account holder with the account details, duly signed and stamped by the Branch Manager.
- In case such bank account is already closed, a duly signed and stamped original letter from such bank on the letter head of bank, confirming the closure of said account.

Documents for updation of bank details wherein bank details were not recorded with us/Registrar/ not available in SoA (Legacy folios)

1] New bank account:

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

AND

2] Self attested copy of any one of the documents (UID-Aadhaar, Passport, Voter ID, Driving Licence) prescribed as list of documents admissible as Proof of Identity (PoI) as prescribed by SEBI.

AND

3] Proof of investment (Optional, based on AMC's risk assessment) such as copy of acknowledgement of investment, debit entry in pass book, counterfoil of the dividend warrant or SoA (issue date more than 2 years old)* / Membership Advice/ certificate from where the investment has been converted / merged to the present scheme, if applicable. **Account statement issued on current date shall not be treated as investment proof.*

Change of Address - Documents Required-Annexure 2

1] KYC Not Complied Folios/Clients

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

- Proof of new Address (POA) and
- 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.

- Based on AMCs internal risk assessment, they may also consider collecting proof of old address, while effecting a change of address.

2] KYC Complied Folios/Clients

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

- Proof of new Address (POA)
- Any other document/form that the KRA may specify from time to time.

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