

Change of Signature / Name Request Form for Individual



SUNDARAM MUTUAL

1. Unit Holder Details :

| Folio Number(s) | Sole/First Unit Holder | Second Unit Holder | Third Holder |
|--|--|---|---|
| | | | |
| Name of the sole/First Unit Holder: | | | |
| Status of First / Sole Applicant [Please ✓]: | | | |
| <input type="checkbox"/> Individual | <input type="checkbox"/> Minor through guardian Body | <input type="checkbox"/> HUF | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Company | <input type="checkbox"/> Corporate | <input type="checkbox"/> Trust | <input type="checkbox"/> Mutual Fund |
| <input type="checkbox"/> NRI-Repatriable | <input type="checkbox"/> NRI-Non-Repatriable | <input type="checkbox"/> FII/Sub account of FII | <input type="checkbox"/> QFI |
| | | | <input type="checkbox"/> Society/Club |
| | | | <input type="checkbox"/> Fund of Funds in India |
| | | | <input type="checkbox"/> Others (please specify)..... |

| 2. Request For [Please ✓] | Change of Signature | Change of Name Holder |
|------------------------------------|---|---|
| Mandatory documents as per request | <input type="checkbox"/> Banker's attestation/letter of new signature (refer point number 6). | <input type="checkbox"/> Self Attested KYC Letter in new name. <input type="checkbox"/> Self Attested PAN card copy in new name. <input type="checkbox"/> Attested copy of Marriage certificate/Divorce Deed/Press Release. <input type="checkbox"/> Valid photo identity proof (for PAN exempt cases only). |

Note: Please produce originals for verification, if copies are not attested by Notary/Gazetted Officers/Bank Managers/Indian Embassy/Consulate General. The Fund House and the RTA reserve a right to call the customer for any additional documents or in-person verification (refer point 6) and keeps this request pending.

3. Bank Account Details for verification Date of Bank Account Opening | | | | | | | | | |---|---|---|---|---|---|---|---| | D | D | M | M | Y | Y | Y | Y | |---|---|---|---|---|---|---|---|

| | | | |
|-------------|--|--------------------|--|
| Bank Name | | Bank Branch & City | |
| Account No. | | Account Type | |
| MICR Code* | | IFSC/RTGS Code* | |

*(9-digit number next to your cheque number)

(*11 character code printed on a cheque / passbook)

4. Old & New Names of unit holders and New Specimen Signatures:

I/we request Sundaram Mutual Fund (the fund) to update new name/s and/or signature/s and various records in the folio/s as per details mentioned above & below. I/we hereby agree that new name/s and/or signature/s will be valid and effective only after the changes are updated and a confirmation is received by me/us. After the new name/signature updation, any requests with old names/signatures will not be honoured by the fund.

| | Sole/First Unit Holder | Second Unit Holder | Third Holder |
|-----------------|--|------------------------|------------------------|
| Old Name/s | Old name for records | Old name for records | Old name for records |
| New Name/s | New name for records | New name for records | New name for records |
| New Signature/s | <input checked="" type="checkbox"/> New Specimen Signature | New Specimen Signature | New Specimen Signature |

5 Bankers Attestation of Customer's Signature & Bank Account Details

| | |
|---------------------|-----------------------------|
| Name of the Banker: | Signature with Bank's Seal: |
| Designation: | |
| Employee Code: | |

6. IPV Section (For office Use) (In case the Fund House/R&T feels the need for IPV as an additional verification procedure)

| | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Verification with PAN Card/Photo Identification Proof PAN Card/Photo <input type="checkbox"/> Signed in official's presence <input type="checkbox"/> Sign matches with signature on Bank attestation | Name:..... Designation:..... Organization:..... Employee No:..... Location:..... Date of IPV:..... | Official signature, with Company Seal |
|---|---|---------------------------------------|

Request Date.....

Place.....

| Acknowledgement (To be filled in by the investor) Change of Signature/Name | Sundaram Mutual Fund |
|--|------------------------|
| Received, subject to verification, request for change of Signature/Name from:..... | |
| Folio No: (1) (2)..... (3)..... | Time Stamp & Signature |