

# Consolidation of Folios Request Form



SUNDARAM MUTUAL

Folios where the following are identical can be consolidated. • Unit holders Name, • Order of holding, • Tax status, •Address, • Mode of holding, • Bank details and • Nominee details.

1. Unit holders' Names: ( Please mention the name of all unit holders in the same order as appearing in the folio)	
Sole/First Holder:	
Second Holder:	
Third Holder:	

2. Mention all Source folios to be consolidated here		
Source folios to be consolidated here ↓	Target Folio (Only one) ↓	
Folio No.1	TO →	Target Folio No.
Folio No.2		
Folio No.3		
Folio No.4		
Folio No.5		
Folio No.		

3. Go Green Services (Save The Future): Please provide Contact Details of First / Sole Applicant	
E-Mail	
STD	Telephone
	Mobile

I/We would like to receive Account Statements, Annual Reports and other information by email and SMS updates on mobile  Yes  No

4. GoGreen I-PIN Services:	
<b>I - PIN [Please ✓]</b>	Existing investor can register their IPIN (Internet Personal Identification Number) online in 3 Simple Steps by visiting us at <a href="http://www.karvyfintech.com">www.karvyfintech.com</a> . With this you can access your account statement/capital gain statement 24x7, view your portfolio and transact online, receive transactional alerts by email/ SMS and subscribe for daily NAV alerts. Applicants who request a Personal Identification Number (PIN) will be deemed to have read, understood and agreed to the terms and conditions for the PIN available at <a href="http://www.sundarammutual.com">www.sundarammutual.com</a> .

**5. Declaration**  
I / We request Sundaram Mutual Fund to consolidate all my / our investments in above mentioned folio nos. to the mentioned target folio no. I understand that consolidation can take place only if a. Names of unit holders, b. Order of holding, c. Tax status, d. Address, e. Mode of holding, f. Bank details and g. Nominee details are identical in all the mentioned folios.

6. Signature(Mandatory Field)		
Sole/First Holder	Second Holder	Third Holder

Request Date..... Place.....

Acknowledgement	Consolidation of Folios: Request Form	Sundaram Mutual Fund
Received, subject to verification, request for SIP Cancellation Request Form		ISC Stamp & Signature
Source Folios: .....		
Target Folio: .....		