

# SERVICE REQUEST FORM



SUNDARAM MUTUAL

Folio Number

Name of the First Unit Holder\*

--	--

You can now opt for electronic payment through NEFT and enjoy hassle free receipt of payments. Register your IFS Code and core banking account number with us to avail this facility. Please contact 1860 425 7237 for more details.

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

## 1. Change of Bank Mandate (Refer Instruction 1)

### Old Bank Details

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

### New Bank Details

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)

## 2. Go Green Services: To Update Contact Details (Refer Instruction 2)

E-Mail	
STD	Telephone
	Mobile

\*Please tick the Family Code for the Mobile Number and Email ID provided

**\*Mandatory**

**MOBILE:**  Self  Spouse  Dependent Children  Dependent Siblings  Dependent Parents  Guardian

**EMAIL:**  Self  Spouse  Dependent Children  Dependent Siblings  Dependent Parents  Guardian

Default Communication mode is E-mail only, if you wish to receive following document(s) via physical mode:

Please tick (✓)  Account Statement  Annual Report  Other Statutory Information

## 3. Nomination Details (Refer Instruction 3)

I / We wish to nominate. (Proportion (%) in which units will be shared by each nominee should aggregate to 100%. In case of single nominee default proportion will be 100%.)

Nominee Name	Nominee PAN	Relationship with applicant	If nominee is minor*		Allocation (%)	Nominee Signature
			Guardian Name	Date of Birth		
1						
2						
3						
Address			*In case of each Minor as Nominee, please mention Guardian's relationship with Minor as Mother / Father / Legal Guardian & Attach proof like Birth Certificate / School Leaving Certificate / Passport / Others.		Total 100%	

I / We DO NOT wish to nominate

**Nomination Declaration:** I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in nonappointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.



Signature is mandatory

Signature is mandatory

Signature is mandatory

Signature of Sole / First Applicant / Guardian

Signature of Second Applicant

Signature of Third Applicant

## 4. To Register PAN & KYC linking (Refer instruction 4)

Permanent Account Number (PAN)	Central KYC Number	<input type="checkbox"/> CKYC Proof attached (Mandatory)
First/Sole Applicant/Guardian		
Second Applicant		
Third Applicant		

First Holder	Second Holder	Third Holder

Request Date.....

Place.....

### Acknowledgement

Folio Number

Request Date DDMMYYYY

Time Stamp/Seal

Received From Mr./Mrs./Ms. ....

Change of Bank Mandate

Go Green Services: To Update Contact Details  Nomination  To Register PAN & KYC linking

Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)

SMS SFUND to 56767

E-mail customerservices@sundarammutual.com

Please refer the instructions given below

### Instruction 1

**For Change of Bank Mandate the investor should submit:**

Existing Bank details# (any one of the below)	New Bank Details (any one of the below)
(1) Cancelled original cheque (bearing account number and name on the face of the cheque);	(1) Cancelled original cheque of the new bank account with name and account number printed thereon;
(2) Original Bank statement;	(2) Self-attested copy of bank statement;
(3) Old Bank passbook with entries for 3 months prior to closure date;	(3) Bank passbook with current entries not older than 3 months;
(4) Original letter by the existing Bank on their letter head duly signed and stamped by branch manager/authorised officials;	(4) Original letter by the Bank on their letter head duly signed and stamped by branch manager/authorised officials.
(5) In case such bank account is already closed, a duly signed and stamped original letter from the bank confirming the closure of bank account. (copy enclosed)	

# In case of non-availability of any of these documents, a self-attested copy of the bank pass book or a statement of bank account with entries for latest 3 months prior to the closure and having the name and address and account number will be required;

# In case of non-availability of above documents and self-attested copy of pass book or statement of bank account, investor should give declaration. Please download the Declaration form from our website [https://www.sundarammutual.com/pdf2/2018/App\\_form/COB\\_Declaration.pdf](https://www.sundarammutual.com/pdf2/2018/App_form/COB_Declaration.pdf)

# In addition, the investor should provide a self attested copy of any one of the ID proof with address viz. PAN, Passport, driving license etc.

#### Remarks:

- Separate forms needs to be filled for separate folios of the investor.
- In the event of a request for change in bank account information being invalid/incomplete/ not satisfactory in respect of signature mismatch/document insufficient/not meeting any requirement more specifically as indicated in clauses, the request will be liable for rejection.

#### Cooling Period

Redemption pay-out will be processed after a 10 days cooling period whenever any change of bank mandate request is received simultaneously with, or just prior to submission of, a redemption request, as a matter of precaution against unauthorized/fraudulent transactions.

### Instruction 2

**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 3

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 4

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.