

SUNDARAM MUTUAL
— Sundaram Finance Group —

Please read the instructions carefully before filling up this form

[illegible]

Name of 1st Holder..... FIRST MIDDLE LAST

☐ Nominate the person(s) more particularly described hereunder to receive the Units held my/our Folio/s listed below in the event of my / our death and/or

☐ Cancel the nomination(s) made by me / us previously in respect of the units held by me/ us in the Folio/s listed below (tick whichever is applicable).

☐ **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%).

Mandatory Details	Particulars	Nominee 1	Nominee 2	Nominee 3
	Name of the Nominee			
	Relationship			
	Allocation (%)**			
	Address			
	Mobile Number			
	E-mail			
	Identity Number*** [Please tick any one and provide details of same]	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number	☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number

Additional Details

Date of Birth#			
Guardian Name (Optional)			

Mandatory only if the nominee is minor.

☐ Name of nominee(s) ☐ Nomination: Yes/No

I hereby authorize to operate my account on my behalf, in case of my incapacitation. He/She is authorized to encash my assets up to% of assets in the account / folio or Rs. (Optional).

☐ 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 non appointment 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.

DECLARATION & SIGNATURE(S) – As per Mode of Holding^ in Demat Accounts / MF Folio(s)

I / We have read the terms and conditions for nomination and hereby nominate the above nominee(s) to receive all the amounts to my / our credits in the event of my / our death. Signature of the nominee(s) acknowledging receipt of my / our credit will constitute full discharge of liabilities in Sundaram Mutual Fund.

	Sole / First Holder	Second Holder	Third Holder
Name			
Signature / Thumb^ Impression of holder			
Witness 1: Name & Address			
Witness 1 Signature:			
Witness 2: Name & Address			
Witness 2 Signature:			

[^] Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature.