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	
IFSC/RTGS Code#			

New Bank Details

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

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

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

	E-Mail	Mobile	STD	Telephone
First/Sole Applicant/Guardian				
Second Applicant				
Third Applicant				

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

	E-Mail	Mobile
First/Sole Applicant/Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian
Second Applicant	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian
Third Applicant	☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian	☐ 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 (✓) ☐ Annual Report ☐ Other Statutory Information

3. To Register PAN & KYC *(Refer instruction 3)*

Permanent Account Number (PAN)	Mandatory	Central KYC Number ☐ CKYC Proof attached (Mandatory)
First/Sole Applicant/Guardian		
Second Applicant		
Third Applicant		

4. Nomination Details *(Refer Instruction 4)*

☐ **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***

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

Acknowledgement

Folio Number

Request Date D D M M Y Y Y Y

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