



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);<br>(2) Original Bank statement; or<br>(3) Old Bank passbook with entries for 3 months prior to closure date; or<br>(4) Original letter by the existing Bank on their letter head duly signed and stamped by branch manager/authorised officials; or<br>(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) | (1) Cancelled original cheque of the new bank account with name and account number printed thereon;<br>(2) Self-attested copy of bank statement;<br>(3) Bank passbook with current entries not older than 3 months;<br>(4) Original letter by the Bank on their letter head duly signed and stamped by branch manager/authorised officials. |

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

# 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)

#### 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

Cooling period of 10 days shall be applicable whenever any change of bank mandate and/or change of address is received/processed prior to submission of redemption request or on the same day as a standalone change request.

### Instruction 2

#### KYC/CKYC Complied Folios / Clients

In case of change of address for KYC complied Folios, Mutual Fund Intermediaries shall collect the following supporting documents:

- Submit duly filled in CKYC form
- KYC Change details form for Individuals/Non-Individuals.
- Self attested copies of proof of new address\* (POA) and PAN accompanied by the originals for verification. In case the original of any document is not produced for verification, then the copies should be properly attested by entities authorised for attesting the documents as under: <http://www.sundarammutual.com/kycdwn/kycdwn.htm>
- Any Other document / form that the KRA may specify from time to time.

\*Not more than 3 months old

### Instruction 3

**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 4

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 5

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/Aadhaar
- Self attested KYC acknowledgement copy in case of registration of KYC.