SUNDARAM MUTUAL

Application Form

Serial No: FI

Channel Partner / Agent Information

Agent's Name and ARN	Sub Agent Code	Transaction charges
		For Rs. 10,000 and above: ☐ Existing Investor - Rs.100 ☐ New Investor - Rs.150

For Office Use Only

Upfront commission shall be paid directly by the investor to the AMFI-registered distributors based on the investors' assessment of various factors including services rendered by the distributor. Please refer instruction no. 2 of the 'Guide to fill the Application Form' for Terms and Conditions relating to transaction charges for both existing and new investors.

1. Existing Investor Information (Please fill in your Folio No. and then proceed to Section 3)
Please note that applicant details and mode of holding will be as per existing Folio Number.

Folio No

2. New Investor Information (refer instruction 2)

Name of First/Sole Applicant

Permanent Account Number **KYC completed** ☐ Yes ☐ No **Date of Birth** D D M M Y Y Y Y

Name of Guardian (in case of First / Sole Applicant is a Minor) **/ Contact Person – Designation** (in case of non-individual Investors)

Permanent Account Number **KYC completed** ☐ Yes ☐ No **Relationship**

Contact Details of First / Sole Applicant **(Please provide your Email ID as it is a must to transact online/receive e-statement & other mailers)**

E-Mail

STD Code | Telephone | Mobile

DEMAT Account Details

☐ National Securities Depository Ltd.
☐ Central Depository Services (India) Ltd.
Depository Participant Name
DP ID Number I N Beneficiary Account Number

Address of First / Sole Applicant

CITY | STATE | PIN CODE

Monthly Income: ☐ < Rs 10,000 ☐ < Rs 25,000 ☐ < Rs 50,000 ☐ < Rs 1,00,000 ☐ > Rs 1,00,000 **Occupation:**.....

Mode of Holding [Please (✓)]
☐ Single ☐ Joint
☐ Anyone or Survivor

Status of First / Sole Applicant [Please (✓)]
☐ Individual ☐ Minor through guardian ☐ HUF ☐ Partnership ☐ Society/Club
☐ Company ☐ Body Corporate ☐ Trust ☐ Mutual Fund ☐ Fund of Funds in India
☐ Others _____ (please specify)

Name of Second Applicant

Permanent Account Number **KYC completed** ☐ Yes ☐ No

DEMAT Account Details

☐ National Securities Depository Ltd.
☐ Central Depository Services (India) Ltd.
Depository Participant Name
DP ID Number I N Beneficiary Account Number

Name of Third Applicant

Permanent Account Number **KYC completed** ☐ Yes ☐ No

DEMAT Account Details

☐ National Securities Depository Ltd.
☐ Central Depository Services (India) Ltd.
Depository Participant Name
DP ID Number I N Beneficiary Account Number

3. Choose the fund you wish to invest and make Cheque/DD in the chosen fund name (refer instruction 3)

☐ Sundaram Money Fund
☐ Sundaram Ultra Short-Term Fund
☐ Sundaram Flexible Fund-Short Term Plan
☐ Sundaram Flexible Fund-Flexible Income Plan
☐ Sundaram Gilt Fund
☐ Sundaram Bond Saver
☐ Sundaram Income Plus
☐ Sundaram Select Debt Short-Term Asset Plan
☐ Sundaram Monthly Income Plan-Aggressive
☐ Sundaram Monthly Income Plan-Moderate
☐ Sundaram Monthly Income Plan-Conservative

3A. Plans (refer instruction 3 and KIM for details)
☐ Retail Plan
☐ Institutional Plan
☐ Super Institutional Plan

3B. Options (refer instruction 3 and KIM for details)
☐ Growth ☐ Dividend Payout ☐ Dividend Re-Investment
If no option is indicated the default option will Dividend Pay Out, in Sundaram Gilt Fund and Sundaram Income Plus, and Growth in all other Schemes

3C. Sub-Options (refer instruction 3 and KIM for details)
☐ Daily ☐ Monthly
☐ Weekly ☐ Quaterly
☐ Fortnightly ☐ Halfyearly
☐ Annual

Acknowledgement

Sundaram Asset Management Company Limited, II Floor, 46 Whites Road, Chennai - 600 014. Toll Free: 1800-425-1000 Ph : (044) 28578700

Serial No: FI

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

Address .....

.....

ISC's Signature & Stamp

Communication in connection with the application should be addressed to the Registrar **Sundaram BNP Paribas Fund Services Limited,** Registrar and Transfer Agents, Unit: Sundaram Mutual Fund, Central Processing Center, RR Towers, II III Floor, Thiru Vi Ka Industrial Estate, Guindy, Chennai 600 032. Toll Free: 1800-425-7237.

Please Note: All Purchases are subject to realisation of cheques / demand drafts.