

Redemption request submitted along with change of bank mandate would result in payment being withheld upto 10 days for validating new bank mandate. Effective May 01, 2012 the forms for redemption request and change of bank account will be segregated to ensure that the two different requests are handled and executed separately for all existing and new customers.

**Name of First/Sole Applicant** (Please use capital Letters)

	Folio No
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Are you submitting a redemption request along with change of bank details. ☐ Yes ☐ No

**Change of Bank Mandate** (please refer check-list for supporting documents-Annexure 1)

Bank	
Branch/Location	
Account No	
Account Type	<input type="checkbox"/> SB <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> FCNR <input type="checkbox"/> CURRENT <input type="checkbox"/> Others.....
RTGS/NEFT/IFSC	
MICR No	

**Change of Address\*/Contact Details** (please refer check-list for supporting documents-Annexure 2)[illegible]

*\*(For non-KYC folios only). For those who are KYC compliant, please use the KYC change details form, and provide self-attested copy of proof of new address, and PAN card.*

**Declaration:** I/We, having read and understood the contents of the Statement of Additional Information/Scheme Information Document, as applicable, agree to abide by the terms, conditions, rules and regulations of the scheme.

Request Date	D	D	M	M	Y	Y	Y	Y
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Signature	First Applicant	Second applicant	Third Applicant

Applicable to NRIs only: Please (✓) ☐

I/We confirm that I am/We are Non-Resident of Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channels or from funds in my/our Non-Resident External / Ordinary Account / FCNR Account on a ☐ Repatriation Basis ☐ Non-Repatriation Basis.

**Acknowledgement** ☐ **Change of Bank Mandate** ☐ **Change of Address** ☐

Request Date:

Time Stamp/Seal

Folio No												
Fund:												
Amount												

**Toll Free 1800 103 7237 (India) +91 44 49057300 (NRI)**

**SMS SFUND to 56767**

E-mail [customerservices@sundarammutual.com](mailto:customerservices@sundarammutual.com)

[www.sundarammutual.com](http://www.sundarammutual.com)

Sundaram Mutual Fund

## Change of Bank Documents Required-Annexure 1

### Change of Bank Request (Standalone Request)

#### 1] New bank account:

Original of **any one** of the following documents may be submitted, or produced for verification, or copy of the same attested by the Bank:

- Cancelled original cheque of the new bank mandate with first unit holder name and bank account number printed on the face of the cheque.
- Self attested copy of bank statement
- Bank passbook with current entries not older than 3 months.
- Bank Letter duly signed by branch manager / authorized personnel

**AND**

#### 2] Existing bank mandate currently registered (Optional, based on AMC's risk assessment):

Original of **any one** of the following documents may be submitted, or produced for verification, or copy of the same attested by the Bank:

- Cancelled original cheque with first unit holder name and bank account number printed on the face of the cheque.
- Original bank account statement / Pass book.
- Original letter issued by the bank on the letterhead confirming the bank account holder with the account details, duly signed and stamped by the Branch Manager.
- In case such bank account is already closed, a duly signed and stamped original letter from such bank on the letter head of bank, confirming the closure of said account.

### Documents for updation of bank details wherein bank details were not recorded with us/Registrar/ not available in SoA (Legacy folios)

#### 1] New bank account:

Original of **any one** of the following documents may be submitted, or produced for verification, or copy of the same attested by the Bank:

- Cancelled original cheque of the new bank mandate with first unit holder name and bank account number printed on the face of the cheque.
- Self attested copy of bank statement
- Bank passbook with current entries not older than 3 months.
- Bank Letter duly signed by branch manager/authorized personnel

**AND**

#### 2] Self attested copy of any one of the documents (UID-Aadhaar, Passport, Voter ID, Driving Licence) prescribed as list of documents admissible as Proof of Identity (Pol) as prescribed by SEBI.

**AND**

#### 3] Proof of investment (Optional, based on AMC's risk assessment) such as copy of acknowledgement of investment, debit entry in pass book, counterfoil of the dividend warrant or SoA (issue date more than 2 years old)\*/ Membership Advice/ certificate from where the investment has been converted / merged to the present scheme, if applicable. *\*Account statement issued on current date shall not be treated as investment proof.*

## Change of Address - Documents Required-Annexure 2

#### 1] KYC Not Complied Folios/Clients

In case of change of address for KYC Not Complied Folios, Mutual Funds shall collect the following supporting documents:

- Proof of new Address (POA) and
- Proof of Identity (POI): Only PAN card copy if PAN is updated in the folio, or PAN/other proof of identity if PAN is not updated in the folio.

- Based on AMCs internal risk assessment, they may also consider collecting proof of old address, while effecting a change of address.

#### 2] KYC Complied Folios/Clients

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

- Proof of new Address (POA)
- Any other document/form that the KRA may specify from time to time.