

Channel Partner / Agent Information															Serial No: EQ				
Agent's Name and ARN <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">ARN-</div>										Sub Agent Code					<div style="border: 1px solid black; padding: 5px;">           EUIN           <div style="display: flex; justify-content: space-between;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div> </div>				
Transaction charges For Rs. 10,000 and above: <input type="checkbox"/> "I/We hereby confirm that where the EUIN space has been left blank by me/us, the transaction is an "execution-only" transaction. 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.										<input type="checkbox"/> Existing Investor-Rs.100 <input type="checkbox"/> New Investor-Rs.150									
<b>Existing Investor Information (Please fill in your Folio No.)</b> Please note that applicant details and mode of holding will be as per existing Folio Number.															Folio No <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>				
New Investor Information																			
<b>Name of First/Sole Applicant</b> <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div>																			
Permanent Account Number <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										<b>KYC completed</b> <input type="checkbox"/> Yes <input type="checkbox"/> No									
<b>Name of Guardian</b> (in case of First / Sole Applicant is a Minor) / <b>Contact Person – Designation</b> (in case of non-individual Investors) <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div>																			
Permanent Account Number (PAN) <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										<b>KYC completed</b> <input type="checkbox"/> Yes <input type="checkbox"/> No									
<b>Name of Second Applicant</b> <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div>																			
Permanent Account Number <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										<b>KYC completed</b> <input type="checkbox"/> Yes <input type="checkbox"/> No									
<b>Name of Third Applicant</b> <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div>																			
Permanent Account Number <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										<b>KYC completed</b> <input type="checkbox"/> Yes <input type="checkbox"/> No									
<b>Contact Details of First / Sole Applicant</b> <i>Receive Account Statements, Annual Reports, and other information instantly by email.</i> <input type="checkbox"/> Yes <input type="checkbox"/> No.																			
E-Mail <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div>					Telephone <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										Mobile <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>				
<i>Note: Where the investor has not opted for any option or has opted for both options the application will be processed as per the default option, i.e., receive the account statement, annual report and other correspondence by email and receive SMS updates on mobile.</i>																			
Systematic Transfer Plan																			
Transferring funds from Scheme <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">Sundaram</div>										Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Others:.....									
Transferring funds to Scheme <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">Sundaram</div>										Option: <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Re-Investment <input type="checkbox"/> Dividend Sweep <input type="checkbox"/> Growth									
Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct										Option: <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Re-Investment <input type="checkbox"/> Dividend Sweep <input type="checkbox"/> Growth									
<b>Each STP Amount</b> Rs <div style="border: 1px solid black; display: flex; justify-content: space-between; width: 100%;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div>										<b>STP Frequency</b> <input type="checkbox"/> Weekly (every Wednesday-Minimum amount Rs 1000) <input type="checkbox"/> Monthly (Minimum amount Rs 250 Minimum No of installments 20) <input type="checkbox"/> Quarterly (Minimum amount Rs 750 Minimum No of installments 7)									
<b>STP Period</b> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 2px;"> <b>STP Starting</b>  <div style="display: flex; justify-content: space-between;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div> </div> <div style="border: 1px solid black; padding: 2px;"> <b>STP Ending</b>  <div style="display: flex; justify-content: space-between;"> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> <div style="width: 15px;"></div> </div> </div> </div>										OR <input type="checkbox"/> <b>Till further notice*</b>									
Date of birth:.....										Date of birth:.....									
Relationship:.....										Relationship:.....									
Name of Guardian:.....										Name of Guardian:.....									
Address of Guardian:.....										Address of Guardian:.....									
(*The date may be taken as 31/12/2031 in case the bank needs to input a specific date in their system)																			
<b>Nominee (available only for individuals)</b>															<input type="checkbox"/> I wish to nominate the following person(s)				
<b>1st Nominee</b> Name:..... Address:..... Proportion (%)* in which units will be shared by first nominee.....% <b>If nominee is a minor:</b> Date of birth:.....Relationship:..... Name of Guardian:..... Address of Guardian:.....										<b>2nd Nominee</b> Name:..... Address:..... Proportion (%)* in which units will be shared by second nominee.....%									