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### Following fields need to be filled mandatorily

- 1. Date: In format DD/MM/YYYY
- 3. Fill Bank Account Number
- 5. IFSC / MICR code: Fill respective code
- 7. Reference 1: Mention Folio Number
- 9. Telephone Number (Optional)
- 11. Period: Starting date and the ending date of NACH registration (not more than 30 years) in the format (DD/MM/YYYY)

13. Name: Mention Holder Name as Per Bank Record

12. Signature as per bank account

10. Email ID

6. Mention Maximum Amount

2. Bank A/c Type: Tick the relevant box 4. Fill name of Destination Bank

8. Reference 2: Mention Application Number

#### Other Instructions

- NACH/OTM Bank Mandate can be used for both SIP and Lump Sum Purchase.
- Investors are allowed to perform Lump sum purchase and SIP on a same day provided the NACH/OTM bank account has the adequate funds to honor multiple debits
- NACH/OTM is applicable for both Individual and Non-Individual
- Registration of Multiple NACH/OTM forms is acceptable with different Bank and Accounts.
- Per transaction limit should be less than or equal to the amount as mentioned in NACH/OTM Form already registered or submitted, if not registered

Bank Name

- Investors are required to submit "NACH/OTM" registration first and only after successful registration an existing "NACH" associated with a SIP can be cancelled.
- NACH/OTM request will be accepted only if the "Bank" mentioned in the request form is listed in the NACH banks list, Please contact offices of Sundaram Asset Management Company/visit www.sundarammutual.com for updated list of banks eligible for NACH/OTM Facility.
- Submitting NACH/OTM form does not confirm your investments in SMF unless supported by SIP Investment Form or Common Transaction forms
- Sundaram Mutual will initiate debit instructions to the investor bank account only on receipt of valid investment instruction from the investor.
- For other Terms and Conditions governing NACH/OTM payments please refer KIM or www.sundarammutual.com
- NACH/OTM is applicable only for investments via debit instructions
- By submitting the NACH/OTM the investor authorizes Sundaram Mutual to utilize the information provided herein for the purpose of his/her investments in Sundaram Mutual Fund, including
- Investors are deemed to have read and understood the requirements and contents of Statement of Additional Information (SAI), Scheme Information Document (SID) and all other scheme related documents

YC compliant $\square$ Yes $\square$ No (if no, please provide CKYC proof/ad		
Scheme Name	Plan:	Option:
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Frequency: ☐ Daily ☐ Weekly® ☐ Monthly* ☐ Quarterly (Refer	er to respective Scheme Information Document for minir	mum criteria)
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Cł	⟨YC compliant ☐ Yes ☐ No (if no, please providence)	de CKYC proof/additional docur	nents if not submitte	d earlier)			
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-	DEMAT Account Details (Investor willing	ng to invest in Demat option, may provid	de a copy of the DP State	ement enabling us to match th	ne Demat details as stated	in the appli	ication form)
	National Securities Depository Ltd.  Central Depository Services (India)  Depository Dep	ory Participant	Beneficiary Ac	count Number			
scl • co or	eclaration: I/We • having read and understood d KIM till date • hereby apply for units under the neme(s) • agree to the terms and conditions for Not not have any existing Micro SIPs/investments a rolling period of twelve months (applicable for mmission or any other mode), payable to him for me/us.	e scheme(s) as indicated in the a NACH/OTM • have not received s which together with the currer r PAN exempt category of inves	pplication form • agr nor been induced by at application will resi tors). The ARN holds	ree to abide by the terms or any rebate or gifts, directly ult in the total investmenter has disclosed to me/u	s, conditions, rules an ctly or indirectly in mak its exceeding ₹ 50,00 is all the commissions	d regulation of this in the final of in the fo	ions of the nvestment ancial year orm of trail
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		Signatures [as per Mutua	al Fund Records / Ap	pplication]			
	First Unit Holder's / Guardian Signature	Second Unit Holder's	· Signature	Thirc	d Unit Holder's Signature		



☐ Growth

## **Systematic Transfer Plan**

To be submitted mandatorily: 1. Your FATCA (Foreign Account Tax Compliance Act) Details (if not already submitted) and 2. Ultimate Beneficial Owner (UBO) information (for non-individuals only) which can be downloded from our website. Distributor's ARN & Name Sub-broker's ARN Sub-broker Code EUIN\* Registered Investment Advisor (RIA) For Office use only (Employee Unique Idendification Number) We confirm that the EUIN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned. Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor Sole/First Applicants Signature Mandatory Folio No Name of First/Sole Applicant \*Please tick the Family Code for the Mobile Number and Email ID provided Email: ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian Mobile: ☐ 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 Name of Second Applicant E-Mail \*Please tick the Family Code for the Mobile Number and Email ID provided

Email: □ Self □ Spouse □ Dependent Children □ Dependent Siblings □ Dependent Parents □ Guardian \*Mandatory **Mobile:** ☐ 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 Name of Third Applicant E-Mail \*Please tick the Family Code for the Mobile Number and Email ID provided \*Mandatory **Email:** □ Self □ Spouse □ Dependent Children □ Dependent Siblings □ Dependent Parents □ Guardian **Mobile:** □ 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 Permanent Account Number (PAN)\* **PEKRN** Central KYC Number CKYC Proof attached (Mandatory) First/Sole Applicant/Guardian Second Applicant Third Applicant Transferring funds from Scheme Plan: ☐ Regular ☐ Direct Option: Income Distribution cum Capital Withdrawal (IDCW) 

Payout Reinvestment Transferring funds to Scheme Sundaram | Plan: ☐ Regular ☐ Direct | Option: IDCW ☐ Payout ☐ Reinvestment ☐ Growth ☐ Fixed Amount ₹ OR 
Capital Appreciation **STP Frequency** □ Daily □ Weekly (every Wednesday) □ Monthly □ Quarterly STP Date - Any Day **STP Period including Perpetual** Request Date OR ☐ Till further notice# (# The end date - 01/12/2099 as end (for Monthly / Quarterly frequency) 0 | 1 | 1 | 2 | 2 | 0 | 9 | **9** date. If not specified by the investor.) **Nomination Details** ☐ 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%.) If nominee is minor Relationship Nominee Name Nominee PAN Allocation (%) Nominee Signature with applicant 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. Time Stamp/Seal Acknowledgement Request Date: Folio No ☐ Fixed Amount ₹ OR Capital Appreciation ☐ Regular ☐ Direct ☐ Others. ☐ Regular ☐ Direct Plan: Plan: **Options:** *IDCW* □ Payout □ Reinvestment □ Transfer Options: *IDCW* □ Payout □ Reinvestment □ Transfer



## **Systematic Transfer Plan**

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document/addenda issued to the SID and KIM till date • hereby apply for units under the scheme(s) as indicated in the application form • agree to abide by the terms, conditions, rules and regulations of the scheme(s) • agree to the terms and conditions for Auto Debit • have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment • do not have any existing Micro SIPs/investments which together with the current application will result in the total investments exceeding ₹. 50,000 in a financial year or a rolling period of twelve months (applicable for PAN/Aadhar exempt category of investors). The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

**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.

I/We hereby declare that all the particulars given herein are true, correct and complete to the best of my/our knowledge and belief. I/ We further agree not to hold Sundaram Asset Management, its sponsor, their employees, authorised agents, service providers, representatives of the distributors liable for any consequences/losses/costs/damages in case of any of the above particulars being false, incorrect or incomplete or in case of my/our not intimating/delay in intimating any changes to the above particulars. I/We hereby authorise Sundaram Asset Management to disclose, share, remit in any form, mode or manner, all/any of the information provided by me/ us, including all changes, updates to such information as and when provided by me/us, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities and other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

Signature												
Signature of First / Sole Applicant / Guardian	Signature of Second Applicant	Signature of Third Applicant										
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Request Date

Investors are requested to note the following terms and conditions with respect to availing

#### 1. Schemes available

As specified in respective Scheme Information Document

#### 2. Date of transfer

STP facility:

Any day STP is eligible for cycle dates of 1st to 31st

- i. For the dates from 1 to 28:
  - STP shall be processed on the given the day if that day is a business day. In case the specified date is a non-business day, it shall be processed on the next business day.
- ii. For the dates from 29 to 31:
  - If the selected date is available in that month and it is a business day, any day STPs should be triggered for processing on that date. If the selected date is not a business day, any day STP shall be triggered for processing on the next business date.
  - If the selected date itself is not available in that month, any day STP shall be triggered for processing on its previous business day.
  - For example, if 29 is not available in the month of February, any day STP shall be triggered for processing on the last business day of February.
  - For example, if 31 is not available in any of the months, any day STP shall be triggered for processing on 30th of that month, provided it is a business day, else last business day of the month shall be considered for any day STP processing.

#### 3. Features of Capital Appreciation Option:

- Capital appreciation in the scheme can be withdrawn or transferred to the specified Destination Scheme at prescribed frequency.
- The Capital Appreciation option will be available only under the Growth option of the eligible schemes.
- Investor opting for STP with capital appreciation, will have to choose Growth as scheme option under destination scheme.
- The minimum investment or current value in the scheme should be Rs. 1,00,000/- on the day of application of STP with capital appreciation option.
- Minimum 6 installments required for registration of STP facility with capital appreciation option.

- STP registration will take minimum 5 Business Days'.
- The respective NAV on the date of registration of STP facility in the scheme will be considered as base NAV for the purpose of calculating the capital appreciation amount for the first installment.
- For subsequent installments, the NAV of the previous processed installment will become the base NAV for the purpose of calculating the capital appreciation amount.
- In case of any additional inflows (including SIP/STP installments) between two STP installments, the capital appreciation amount will be identified by the difference in NAV of creation of such additional units and the NAV of the scheme on the date of STP installment.
- In case the specified date of any installment falls on a non-business day for
  either of the schemes, the STP installment will be processed on the following
  business day of both the schemes.

#### 4. Minimum amount of transfer

Minimum Any Day STP Amount/instalment: As stated in the respective Scheme Information Document (SID) / Key Information Memorandum (KIM) and satisfying the minimum criteria of source and target schemes.

Load Structure, please refer the respective Scheme information document (SID) / Key Information Memorandum (KIM) for more details.

#### 6. Discontinuation of STP, for all frequencies

- a) When the outstanding balance in "transferor Scheme" does not cover any of the STP instalment amount, all outstanding units will be liquidated and STP will be effected for such outstanding balance (subject to the transfer amount satisfying the minimum investment criteria in the destination scheme) and STP will be terminated for subsequent instalments.
- b) STP will be terminated if all units from the Transferor Scheme are pledged or upon receipt of intimation of death of first/sole unit holder.
- c) Investors can also choose to terminate the STP by giving a written notice of at least 7 Business Days in advance to the Official Points of Transactions and accordingly, termination of STP shall be effected on receipt of valid request.
- The Trustee / AMC reserve the right to change / modify the terms of the STP or withdraw this facility from time to time.
- 8. Please refer to the respective scheme KIM / SID for more details.

Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI) • E-mail: customerservices@sundarammutual.com (NRI): nriservices@sundarammutual.com Sundaram Mutual Fund



www.sundarammutual.com

# **Systematic Withdrawal Plan**

**Sundaram Mutual Fund** 

To be submitted mandatorily: 1. Your FATCA (Foreign Account Tax Compliance Act) Details (if not already submitted) and 2. Ultimate Beneficial Owner (UBO) information (for non-individuals only) which can be downloded from our website.

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# **Systematic Withdrawal Plan**

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Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI) • SMS SFUND to 56767 • E-mail: customerservices@sundarammutual.com (NRI): nriservices@sundarammutual.com

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