SUNDARAM MUTUAL

Application Form-Systematic Transfer Plan

Channel Partner / Agent Information

Agent's Name and ARN	1.Sub Agent Code	2.Sub Agent Code	3.Sub Agent Code	For Office Use Only
ARN - 0163				

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

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

Folio No

New Investor Information

Name of First/Sole Applicant

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

Name of Second Applicant

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

Name of Third Applicant

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

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

Systematic Transfer Plan

Transferring funds from Scheme: Sundaram

Plans: ☐ Regular ☐ Institutional | Option: ☐ Dividend Payout ☐ Dividend Re-Investment ☐ Dividend Sweep ☐ Growth ☐ Others.....

Transferring funds to Scheme: Sundaram

Plans: ☐ Regular ☐ Institutional | Option: ☐ Dividend Payout ☐ Dividend Re-Investment ☐ Dividend Sweep ☐ Growth ☐ Others.....

Each STP Amount Rs

STP Frequency ☐ Weekly (every Wednesday-Minimum amount Rs 1000) ☐ Monthly (Minimum amount Rs 250 Minimum No of installments 20) ☐ Quarterly (Minimum amount Rs 750 Minimum No of installments 7)

Period for the STP ☐ 1 year ☐ 2 years ☐ 3 years ☐ 5 years ☐ 10 years ☐ 15 years ☐ Perpetuity

STP Starting M M Y Y Y Y **STP Date** (for monthly and quarterly options) ☐ 1 ☐ 7 ☐ 14 ☐ 20 ☐ 25

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document • hereby apply for units as indicated in the application form • agree to abide by the terms, conditions, rules and regulations of the scheme • agree to terms & conditions of PIN agreement • agree to receive account statement/communication by Email • 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 which together with the current application will result in the total investments exceeding Rs. 50,000 in a year. 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.

Nominee (available only for individuals)

☐ I do not wish to choose a nominee
☐ I wish to nominate the following person

Name:.....

Address:.....

.....

If nominee is a minor: Date of birth:.....Relationship:.....

Name of Guardian:.....

Address of Guardian:.....

Signature of Nominee/Guardian of Nominee

Signature

First / Sole Applicant / Guardian

Second Applicant

Third Applicant