SUNDARAM MUTUAL

Form for SIP Auto Debit Facility

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
NJ India Invest / ARN-0155	55537			

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

If Micro SIP, please tick ☐ Yes (Micro SIP: Less than Rs 50,000 per person in any rolling 12-month period)

If Micro SIP, supporting document/identification number: .....

Fund Name

Plans and Options

Plan ☐ Regular Plan ☐ Institutional Plan ☐ Super Institutional Plan
Option ☐ Dividend Payout ☐ Dividend Re-Investment
☐ Dividend Sweep ☐ Growth ☐ Others.....

Each SIP Amount Rs ☐☐☐☐☐☐☐☐☐☐

SIP Frequency
☐ Weekly (Minimum amount Rs 1000 Every Wednesday)
☐ Monthly (Minimum amount Rs 250 Minimum No of installments 20)
☐ Quarterly (Minimum amount Rs 750 Minimum No of installments 7)

Period for the SIP

☐ 1 year ☐ 2 years ☐ 3 years ☐ 5 years
☐ 10 years ☐ 15 years ☐ Perpetuity

SIP Starting M M Y Y Y Y **SIP Date** ☐ 1 ☐ 7 ☐ 14 ☐ 20 ☐ 25

Initial Cheque/DD No ☐☐☐☐☐☐☐☐☐☐

Bank Account Details

Name as in bank account:.....

Bank Name:.....

Branch:.....

Account Number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Account Type ☐ Savings ☐ Current ☐ Others.....

Nine-digit MICR No from cheque ☐☐☐☐☐☐☐☐☐

To know your MICR number, please refer your cheque leaf →

KYC completed ☐ Yes ☐ No

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 the terms and conditions for Auto Debit • 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.

Signature
First / Sole Applicant / Guardian
Second Applicant
Third Applicant

Authorisation & Signature of Bank Account Holder

Account Number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

I/We have registered for ECS for my investment in Sundaram Mutual Fund from the indicated account with your bank and authorise the representative carrying this mandate to get it verified and executed.

First / Sole Applicant / Guardian	Second Applicant	Third Applicant