

**Channel Partner / Agent Information**

Agent's Name and ARN	1.Sub Agent Code	2.Sub Agent Code	3.Sub Agent Code	<b>For Office Use Only</b>

Uprfront 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)**

E-Mail

STD Code  Telephone  Mobile

**Systematic Transfer Plan**

Transferring funds from Scheme Sundaram

Plans:  Retail  Institutional  Super 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**  **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)**

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

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Second Applicant

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Third Applicant