

Minor Attains Majority Request Form to Register Details



SUNDARAM MUTUAL

Folio Number(s):

This is to inform you that I, (Name), the First Unit holder in the above Folio, have attained the age of majority and you are requested to transfer all units in my name and remove the Guardian Name Also kindly update my details in your records as mentioned below for the referred Folios. I am submitting the following documents herewith:

1. Self-Attested KYC Acknowledgement Letter.
2. Self-Attested Pan Card Copy (for date of birth and identification proof).
3. My **FATCA Details** (Foreign Account Tax Compliance Act) & **KYC Additional Details** (if not already submitted).

1. Erstwhile Minor turned Major Details (Refer Instruction 1)

Date of Birth	D	D	M	M	Y	Y	Y	Y	
PAN & KYC Letter (Mandatory)									<input type="checkbox"/> Yes, I am submitting a KYC Letter
Tax Status (Mandatory)	<input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI (Repatriable) <input type="checkbox"/> NRI (Non-Repatriable)								

2. Go Green Services: To Update Contact Details (Refer Instruction 2)

E-Mail	<input type="text"/>
STD	Telephone <input type="text"/> Mobile <input type="text"/>

By providing the details above, I confirm that I wish to receive the account statement, annual report and other correspondence by email and receive SMS updates on mobile.

3. Go Green Web / I-PIN Services (Refer Instruction 3) [Please (✓)]

Yes. I wish to receive an Internet PIN (IPIN) for online transactions and agree to PIN terms and conditions as available in SID/SAI and www.sundarammutual.com. Email ID and PAN are mandatory for PIN issuance

4. Nomination (Refer Instruction 4) Mandatory to fill in all fields. Proportion (%) in which units will be shared by each nominee should aggregate to 100%. In case of single nominee default proportion will be 100%.

I wish to nominate the following person(s)

1st Nominee Name:..... Address:..... Proportion (%) in which units will be shared by first nominee.....% If nominee is a minor: Date of birth:.....Relationship:..... Name of Guardian:..... Address of Guardian:.....	2nd Nominee Name:..... Address:..... Proportion (%) in which units will be shared by second nominee.....% If nominee is a minor: Date of birth:.....Relationship:..... Name of Guardian:..... Address of Guardian:.....	3rd Nominee Name:..... Address:..... Proportion (%) in which units will be shared by third nominee.....% If nominee is a minor: Date of birth:.....Relationship:..... Name of Guardian:..... Address of Guardian:.....
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5. To Update Bank Details (Refer Instruction 5) Please enclose an original cancelled cheque leaf / passbook wherein the bank account number and mutual fund first holder name are printed (Mandatory) or a copy of the same attested by your current banker.

Bank Name	<input type="text"/>	Bank Branch & City	<input type="text"/>
Account No.	<input type="text"/>	Account Type	<input type="text"/>
MICR Code*	<input type="text"/>	IFSC/RTGS Code*	<input type="text"/>

*(9-digit number next to your cheque number)

(*11 character code printed on a cheque / passbook)

Signature of Unit holder (erstwhile Minor, now Major) (Mandatory Field)	<input type="checkbox"/> Bankers Attestation (Mandatory, If Letter from Banker not attached) or <input type="checkbox"/> Bankers Letter	
Date: Place:	Name of the Banker: Designation: Employee Code:	Signature with Bank's Seal:
Signature of the Guardian (Mandatory Field)		
Date: Place:		

Acknowledgement (To be filled in by the investor) Minor Attains Majority	Sundaram Mutual Fund
Received, subject to verification, request for change of status from minor to major from:..... Folio No: (1) (2) (3) Checklist Mandatory documents: <input type="checkbox"/> KYC Letter <input type="checkbox"/> Proof of new Bank account details	Time Stamp & Signature

Please refer the instructions given below

Instruction 1

In case of Registration of PAN / KYC (Know Your Client), Mutual funds shall collect the following supporting documents:

- Self-attested PAN Copy in case of registration of PAN.
- Self-attested KYC acknowledgement copy in case of registration of KYC.

For those who are not KYC compliant, please refer the link http://www.sundarammutual.com/kyc_faqs/kyc_faqs.htm to download KYC forms and for FAQs

Instruction 2

Go Green E-Update Services: By providing details of your personal email address, you will receive your account statement by paperless mode via email, in an efficient and timely manner. You would also be contributing to the environment. The investor is deemed to be aware of security risks including interception of documents and availability of content to third parties. Sundaram Asset Management provides interesting information on the economy, markets and funds. If you wish to receive your account statement, annual report and other such updates by email, please fill in your email address overleaf. Further, by providing your mobile number, you can avail of instant SMS alerts for your transactions.

Instruction 3

Go Green Web Service Web/IPIN Services: Use Sundaram Mutual Go Green Services and get an I-PIN (Personal Identification Number) to transact online. You can keep track of your investment online at www.sundarammutual.com. To use this facility, you need to have a Unique Identification Number through Personal Identification Number (PIN) provided by Sundaram BNP Paribas Fund Services Limited, the Registrar. Choose 'Yes' to avail this facility and also make a further contribution towards the environment by helping conserve paper and trees. Applicants who request a Personal Identification Number (PIN) by ticking the 'Yes' box will be deemed to have read understood and agreed to the terms and conditions for the PIN that are available at www.sundarammutual.com. If you are an existing investor and wish to transact online without an IPIN, please register online by visiting www.sundarammutual.com.

Instruction 4

Please indicate a nominee who should be entitled to the benefits of your investment in the event of an untoward development. Where a folio has joint holders, all holders should sign the request for nomination even if the mode of holding is not "joint." Every new nomination for a folio/account will overwrite the existing nomination. Nomination is not applicable in case of non-individuals or when the account/folio is held on behalf of a minor. Nomination forms cannot be signed by Power of Attorney Holders.

Instruction 5

Original of any one of the following documents may be submitted, or produced for verification, or copy of the same attested by the Bank:

- Cancelled original cheque of the new bank mandate with first unit holder name and bank account number printed on the face of the cheque.
- Self-attested copy of bank statement
- Bank passbook with current entries not older than 3 months
- Bank Letter duly signed by branch manager / authorized personnel