THIRD	THIRD HOLDER DETAILS																						
Name																							
PAN*															DOB*	D	D	$ \cdot $	M	Y	Y	Y	Y
CKYC KIN																							
Mobile															Email ID*								

*Please tick the Family Code for the Mobile Number and Email ID provided

Mobile:
Self
Souse
Dependent Children
Dependent Siblings
Dependent Parents
Guardian

*Mandatory

Email: 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

Application Form

4. INVESTMENT & PAYMENT DETAILS (Stamp Duty Applicable)																												
Scheme Name	Scheme-1										Scheme-2									Scheme-3								
Plan	Regular Direct							F	Regula	ar	☐ Di	rect						Regu	lar		Direc	et						
		Growt	h						n cum		Growth Income Distribution cum Capital Withdrawal (IDCW)								Growth Income Distribution cum									
				Capital Withdrawal (IDCW) Payout						(V)				Ca	a pital v Payo		drawa	I (IDC							SW)			
				Reinvestment						Reinvestment					Payout Reinvestment													
Option	Transfer*					Transfer*													ransfe									
Орион	IDCW Frequency (For Fixed Income Funds only):						IL	IDCW Frequency (For Fixed Income Funds only):							IDCW Frequency (For Fixed Income Funds only):													
							 (á	(applicable as per SID & KIM of respective Funds)							(applicable as per SID & KIM of respective Funds)													
	*Transfer (IDCW) Target Scheme						*	Trans	sfer (II	OCW)	Target S	cheme					*Transfer (IDCW) Target Scheme											
										□ Direc						☐ Regular Growth ☐ Direct Growth												
(*If target scheme is not i	mentio	ned for Tra	anster (IDCW)	default OTM		ie is "Su Chegi			and su		on Growti	1") Any /	 						get scheme has to be counter-signed by the investor(s) to make it a valid sele								
Payment Mode							'		t to reali				Ŭ,	OTM L und Tran			DD iect to	_				UOTM Fund				DD ∟ at to re	」RTGS alisatio	
Cheque / DD / Refe	rence	No.					- 1	,								,			,					- (
Payment from Bank A	Accou	nt No.																										
Drawn on Bank / Bi																												
Amount (₹)	-	igures																										
Account Tune		Vords	7.					7			_	1			1 _				-									
Account Type				avin				NRC				NRE	-	Current						CNR			thers	O				
5. BANK ACCOUNT	DEI	AILS FO	K PA	YOUI	(Mand	atory	to att	acn prod	of, in cas	se the	pay-	out ban	к ассо	unt below			rom th	e cned	ue iss	sued 1	or inve	stment as	s per se	ection	4)			
IFSC CODE															MIC	CR												
Bank Account No																												
Bank Name Bank Name																												
Account Type Sav	Account Type Savings NRO NRE Current FCNR Others → Please specify																											
6. LEGAL ENTITY IDEN	TIFIER	(Mandato	ory) - ((Only fo	r Non-In	dividu	ials incl	uding HU	F for trans	saction	s amo	unting to	Rs. 50	Crores and a	above) Su	ındara	am Mutu	al Fund	- LEI N	umber	33580-0	Q-DGDY5P	CN345-8	81 (The	LEI exp	ires on N	larch 20,	2024)
VALIDITY DATE OF L	.EI			D	N		M	Y	Y		Y	Y																
Address of First / S	ole A	plicant	<u> </u>]																			
Town:	/:		District			٨					State:								PIN Code:									
Overseas Address	(in ca	se oi inh	IS/FIIS	S) (IVIA	naator	()																						
7. Systematic Trans	sactio	n Regis	tratio	n Det	ails – F	lease	e indic	ate deta	ils of yo	ur SIF	skip)	this sec	tion if yo	ou wish to ma	ake a one	-time i	investme	ent)						(Refer	Guide to	investin	g througl	h SIP)
Mode of SIP							nit Si	P Reg										Eac	h SIP	Amou	ınt ₹							
SIP Period Month/Ye		SIP S			1 M			Y				-		0 years	· <u>-</u>				Y	Y	<u> </u>							
# End date should SIP Date-Any		ess tnai	n or e	equa	1 to 30	yeai	_		 ¬				-	_						0 /	,		-					, , ,
on Bato rany	Duj		SI	D Fro	quency	F		aily ∟ ∵•Wo	∟ Wee	,		Mont	,	Qua ∙ Minimur	,	•		,										,
SIP Date:			JI	FIIÇ	quency	aı	mour	t of ₹ 1	100, mir	nimu	m No	o. of ir	nstalln	nents is 6	6) • Qı	uarte	erly (F	or M	nimu	m an	nount	of ₹ 750	, mini	mum	No. c	of insta	allment	is is 6)
(for Monthly / Quarterly I	Freque	ency)			STI		Dalily	(IOT IVI	Inimum	amo	uni () ₹ ()	U, IVIII	nimum pe	riod 3	mon	itris)				SWP							
Source Scheme			T		511									obore:							JWP							
Target Scheme														Scheme														
Option					ixed A				apital Ap		iation	n optio		Option				☐ Fixed Amount							precia	tion op	tion\$	
Amount (figures)					D				unt Option		orly .		_	mount (fig	gures)			_				For fixed]
Frequency STP Date - Any Date	y (for	Monthl	у		ı ı	ally /	vveek	ıy / IVIOI	nthly / Q			1		requency WP Date	- Any D	av (f	or	+				Month	пу / Q		<u> </u>	N //		
/ Quarterly frequen	cy)		-		-	U		/ <u> </u>	IVI T	o Dat	IVI e		M	lonthly / C)uarterl			y)			ΙD	ΙD	1	\/		M		
STP Period	m.r.=	ati)m#'		rom D		00-1							WP Period		/				Fror	n Date				To	Date		

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												App	IICa	ition	ГО	rm		
8. OCCUPAT	ION																	
	Private Sector Service	Public Sector Government Service	e Housewife	Busines	s Professional	Agricultur	ist Retired	Student	Forex Dea	aler O	thers		(Others				
1st Holder													S	pecify				
2nd Holder											Specify							
3rd Holder	ır								Specify									
CDOCC ANN	IUAL INCOME	<u>'</u>		1														
GRUSS ANN	IUAL INCOME						Net worth (I	Mandatory for										
	Below 1 Lac	1-5 Lacs 5-1	> 1 Crore		viduals) - ₹			As on	date	ate								
1st Holder									D	D	M	M	Υ	Y	Υ	Y		
2nd Holder									D	D		M		Y		Y		
3rd Holder									D	D	M	M	Y	Y	Y	Y		
PEP & UBO	Details																	
	I am politically exposed person	Related to PEP	Is the company a	Listed Cor	mpany or Subsidiary of L If no, Please attach man	isted Company datory UBO dec	or Controlled by claration)	a Listed Compa	ny / N	Foreign E loney Char	xchange ger Services	Faming	Faming / Gambling / Lottery / Casino Services			Money Lending Pawning		
	Yes NA	Yes No		Yes			No			Yes	No Yes		No		Yes No			
1st Holder																		
2nd Holder																		
3rd Holder																		
9. FATCA-CRS DETAILS For Individuals (Mandatory) Non Individual investors & HUF should mandatorily fill separate FATCA-CRS Annexure																		
		•	licant(s) / guardia	n / PoA l	holder			TTOTT III CATTO			or onouna	inanaaton.	y 00p			ППОХОТО		
			Category				First App	licant/Guardia	n	Sec	cond Appli	cant		Third A	pplicant	t		
1. Are you	a Tax Reside	ent of Countr	y other than In	dia?			□ Ye	es 🗆 No			Yes	No		☐ Yes ☐ No				
2. Is your C	Country of Bir	th/ citizenshi	ip other than li	ndia?			☐ Yes ☐ No			☐ Yes ☐ No				☐ Yes ☐ No				
3. Is your F	Residence ac	n in India?	☐ Yes ☐ No			☐ Yes ☐ No				☐ Yes ☐ No								
	A holder / pe ne categories	d under	□ Ye	☐ Yes ☐ No				□Yes	. □No)								
If you have	e answered	YES to any	of above, plea	ase pro	vide the below	details												
· ·	Tax Resider	nce																
Nationality					-1.													
			son for not pro	viding I	IN													
	• • • • •	<u> </u>	lease specify)	01-1-	O	1 - \												
Residence	e address for	tax purpose	es (include City	, State	, Country & Pin c	ode)							_					
Addraga T								tial or Busir			ential or							
Address T	ype						_	tial 🗌 Busi	_	_	ential		Residential Business Registered Office					
City of birt	h						Hegister	red Office			tered Of	iice	-	registere				
Country of																		
\$ In case any o	f applicant being	g resident/ tax p	ayer in more than	one coun	try, provide tax identi	fication numb	er for each sucl	h country sepa	rately.									
FATCA-CF	RS Instructio	ns																
Details unde	er FATCA-CF	S/Foreign Ta	ax Laws: The (Central E	Board of Direct Ta	xes has no	tified Rules 1	14F to 114H	l, as par	t of the I	ncome Ta	ax Rules	1962, w	hich Rule	es requi	ire Indiar		
financial inst	itutions such mstances (inc	as the Bank to	to seek additio do not receive :	nal pers a valid s	sonal, tax and ben self-certification fro	neficial own om vou) we	er information may be oblic	n and certai aed to share	n certific informa	cations a	and docui	mentatior	n from a elevant	all our acc	count he prities/a	olders. Ir		
agencies. If	you have any	questions ab	out your tax re	sidency	, please contact y	our tax adv	isor. Should	there be any	change	e in any	informat	tion prov	ided by	you, ple	ase en	sure you		
appropriate	withholding fr	om the accou	unt or any proc	eeds in	e, we may also be relation thereto. A	As may be r	required by c	mation to an Iomestic or (y institut overseas	ions suc s regula	tors/ tax a	nolding a	gents to s, we m	or the pur ay also b	oose of e const	ensuring rained to		
If you are a	US citizen o	r resident o	r greencard ho	older, pl	suspend your ac	ited States	in the Cou	ntry of Tax	Resider	nce field	d along w	vith your	US Tax	x Identifi	cation	Number		
\$ It is mar	ndatory to su	pply a TIN or	functional equ	ivalent i	vn as FATCA) are if the country in w	hich you ar	re tax resider		ch ident	ifiers. If	no TIN is	yet avail	able or	has not y	et bee	n issued		
please p	provide an ex			ocumen	ts and attach this	to the form					Applic	otion N-						
sf sun	DARAM MUTU.	ACKNON Sundara	wledgement m Asset Manag or, 46 Whites Roa	ement C	Company Limited, (nai - 600 014. Cont	CIN: U93090	TN1996PLC0	34615, idia) +91 40 3	2345 221	5 (NRI)	Abblic	ation No).					
Received E	rom Mr./Mrs.		,	2, 0.1011	230 0.1. 0011			,		. ()	'							
Communication	in connection w	ith the application			the Registrar KFin Te Chennal-600034. Con													

Please Note: All Purchases are subject to realisation of cheques / demand drafts.

ISC's Signature & Stamp

Application Form

	Iomination Details (Refer	<u> </u>								
	/ We wish to nominate. (F	Proportion (%) in which units	s will be shared by each non				nee default propor		0%.)	
	Nominee N	ame	Nominee PAN	Relationship with applicant	If nomin Guardian Name	ee is minor*	Date of Birth	Allocation (%)	Nominee Signature	
1					durdian Name		Dute of Birth	,		
2										
3										
	We DO NOT wish to nom			with Minor as Mo Certificate / Schoo	linor as Nominee, please ther / Father / Legal Gua Leaving Certificate / Pass	ardian & Attac sport / Others.	ch proof like Birth			
nonar	ppointment of nominee(s) ar competent authority, based	nd further are aware that in on the value of assets held	e do not wish to appoint any case of death of all the acc in the mutual fund folio.	ount holder(s), my /	mutuai fund units neid i our legal heirs would ne	n my / our m eed to submi	it all the requisite	nd understand documents is:	ithe issues involved in sued by Court or other	
	on-Profit Organization (NP	,	nas been constituted for relig	Company of the State of the	and the second second	(4.5) - (section Yes			
2 of til State If yes If not, yes If not regis Application Application In not yes If	ne Income-tax Act, 1961 (43 legislation or a Company eplease quote Registration I please register immediatel ster your entity name in the the respective statutory recration: I/We • having read for units under the scheme IACH • have not received for units under the scheme IACH • have not received for units under the scheme IACH • have not received for units under the scheme is being recommend to be the me is being recommend to be the me is being recommend to the me is being recommend to the me is being recommend or statutory of the same. I/We hereby a cation: I/We have underst is true, correct, and comple gree to indemnify Sundarar I income tax purposes. or in Duty: Pursuant to Notifica er IV of The Finance Act, 20 of units would be levied on	B of 1961), and is registered winder the section In No. of Darpan portal of Niting above portal and may requirements and authorize and understood the control of the control of No. So. 126(E) and Invested and understood the control of No. So. 1226(E) and Invested In	as a trust or a society under 8 of the Companies Act, 20	the Societies Regis 13 (18 of 2013). et above confirmations as applicable, arges under intimational Information de by the terms, colirectly in making the er mode), payable the findian Nationality al/Ordinary Accounter the distributors lialing any changes to us, including all conditions, other investigation that may be along with the FATCA-Cany false, misleadid under applicable the 30, 2020 issued we Department, Mict from July 1, 202!	ion or registration with We am/are aware that wation to me/us or collection/Scheme Information londitions, rules and regist investment • do not iod of twelve months (a o him for the different of the work of the	the portal as we may be lit such fines/ Document/a gulations of the have any exapplicable for competing Solutions of the have any exapplicable for competing Solutions of the have any exapplicable for competing Solutions of the have any example for the formatic series of the solutions and here omplete informations and here of the following the fol	similar No mandated, where able for it for any charges in any of ddenda issued to the scheme(s) • a sisting Micro SIPs r PAN exempt can be assisted and so and so and when a chemes of various there agree not to osts/damages in authorise Sundary as and when a cheme in the matter agree not to osts/damages in authorise Sundary as and when a cheme in the matter agree not to osts/damages in authorise Sundary as and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in any of the matter agree not to osts/damages in any of the matter agree not to osts/damages in any of the matter agree not to osts/damages in any of the matter agree not to osts/damages in any of the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in authorise Sundary and when a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a cheme in the matter agree not to osts/damages in a	r fines or consther manner as the SID and gree to the SID and gree to the tegory of fines is Mutual Funduloscription has patriation Base hold Sundara case of any oram Asset Maprovided by res without any formation prome. The patria of Ir my out "U.S. overnment of Ir mp duty @0.0.	sequences as required simight be applicable. I KIM till date • hereby trms and conditions for which together with the stors). The ARN holdeds from amongst which are been remitted from sis. I/We further declared an agement to disclose ne/us, to any Indian or obligation of advising vided by me/us on this person" status for U.S. adia, read with Part I co. 105% of the transaction.	
			MRN Consent Declaration eme(s) of Sundaram Mutua e transactions data feed/pc -Registered Investment Ad		t Plan under the above V etc. in respect of my ager:	e mentioned /our investm	Account No(s)./F ents under Direc	olio No(s). t Plan of all S	chemes managed by	
	Registration Number ARN				Registration No.					
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	neme Name / Plan / ption / Sub-option	Goal	Cheque / DD / Payment Instrument Number / Date		n (Name of & Branch)	Amo	ount in figures	in figures (₹) & Amount in		
		☐ Lumpsum Purchase								