

Channel Partner / Agent Information

Agent's Name and ARN ARN - 0988 Ganesh S. Shanbhag	1.Sub Agent Code	2.Sub Agent Code	3.Sub Agent Code
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For Office Use Only

Upront 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

1. Existing Investor Information (Please fill in your Folio No. and then proceed to Section 3)

Please note that applicant details and mode of holding will be as per existing Folio Number.

Folio No

2. New Investor Information (refer instruction 2)

Name of First/Sole Applicant

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Permanent Account Number

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KYC completed Yes No

Date of Birth

D	D	M	M	Y	Y	Y	Y
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Name of Guardian (in case of First / Sole Applicant is a Minor) / Contact Person - Designation (in case of non-individual Investors)

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Permanent Account Number

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KYC completed Yes No

Relationship

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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																													
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STD Code

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Telephone

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Mobile

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Address of First / Sole Applicant

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CITY

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STATE

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PIN CODE

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Monthly Income: < Rs 10,000 < Rs 25,000 < Rs 50,000 < Rs 1,00,000 > Rs 1,00,000 Occupation:.....

Mode of Holding [Please (✓)]
<input type="checkbox"/> Single <input type="checkbox"/> Joint
<input type="checkbox"/> Anyone or Survivor

Status of First / Sole Applicant [Please (✓)]
<input type="checkbox"/> Individual <input type="checkbox"/> Minor through guardian <input type="checkbox"/> HUF <input type="checkbox"/> Partnership <input type="checkbox"/> Society/Club
<input type="checkbox"/> Company <input type="checkbox"/> Body Corporate <input type="checkbox"/> Trust <input type="checkbox"/> Mutual Fund <input type="checkbox"/> Fund of Funds in India
<input type="checkbox"/> Others _____ (please specify)

Name of Second Applicant

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Permanent Account Number

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KYC completed Yes No

Name of Third Applicant

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Permanent Account Number

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KYC completed Yes No

3. Choose the fund you wish to invest and make Cheque/DD in the chosen fund name (refer instruction 3)

<input type="checkbox"/> Sundaram Money Fund	<input type="checkbox"/> Sundaram Gilt Fund
<input type="checkbox"/> Sundaram Ultra Short-Term Fund	<input type="checkbox"/> Sundaram Bond Saver
<input type="checkbox"/> Sundaram Flexible Fund-Short Term Plan	<input type="checkbox"/> Sundaram Income Plus
<input type="checkbox"/> Sundaram Flexible Fund-Flexible Income Plan	<input type="checkbox"/> Sundaram Select Debt Short-Term Asset Plan

3A. Plans (refer instruction 3)

<input type="checkbox"/> Regular Plan
<input type="checkbox"/> Institutional Plan
<input type="checkbox"/> Super Institutional Plan

3B. Options (refer instruction 3)

<input type="checkbox"/> Dividend Payout
<input type="checkbox"/> Dividend Re-Investment
<input type="checkbox"/> Dividend Sweep <input type="checkbox"/> Growth

Acknowledgement

Sundaram Asset Management Company Limited, II Floor, 46 Whites Road, Chennai - 600 014. Toll Free: 1800-425-1000 Ph : (044) 28578700

Received From Mr./Mrs./Ms.

Address

Communication in connection with the application should be addressed to the Registrar **Sundaram BNP Paribas Fund Services Limited**, Registrar and Transfer Agents, Unit: Sundaram Mutual Fund, Central Processing Center, RR Towers, II III Floor, Thiru Vi Ka Industrial Estate, Guindy, Chennai 600 032. Toll Free: 1800-425-7237.

ISC's Signature & Stamp

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

4. How do you wish to receive the following (refer instruction 4)

Dividend				Redemption		
<input type="checkbox"/> Direct Credit (DC)	<input type="checkbox"/> RTGS/NEFT	<input type="checkbox"/> Electronic Clearing Service (ECS)	<input type="checkbox"/> Warrant	<input type="checkbox"/> Direct Credit (DC)	<input type="checkbox"/> RTGS/NEFT	<input type="checkbox"/> Warrant

Direct Credit is now available with: Axis Bank, BNP Paribas Bank, Citibank, Deutsche Bank, HDFC Bank, HSBC Bank, ICICI Bank, IDBI Bank, IndusInd Bank, ING Vysya, Kotak Mahindra Bank, Royal Bank of Scotland, SBI, Standard Chartered Bank, YES Bank.

Account Statement Will be sent by Email. To receive physical statement please tick

Do you wish to receive updates (refer instruction 4) [Please (✓)] by E-Mail Yes No SMS Yes No

5. Please indicate details of your SIP (skip this section if you wish to make a one-time investment)

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)

Mode of SIP Auto Debit (also submit SIP Auto Debit form) Post-dated cheques

Period for the SIP

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

SIP Starting SIP Date 1 7 14 20 25

If you opt for SIP through post dated cheques, please indicate

First SIP Cheque No Last SIP Cheque No

6. Bank Account Details are Mandatory (refer instruction 6)

Name of the Bank Branch

Branch Address City (redemption & dividend will be payable at this location)

Account No

If you opt for ECS fill Cheque MICR No Account Type [Please (✓)] SAVINGS CURRENT Others.....

If you have chosen RTGS / NEFT please fill: RTGS / NEFT IFSC Code

Beneficiary Name

Name of the Bank Branch City

7. Payment Details (refer instruction 7) Please issue a separate Cheque/Demand Draft in favour of the fund you wish to invest

Cheque / DD No. Date

Amount in words (Rs) Drawn on Bank

Amount in figures (Rs) DD Charges Net Amount Branch Name

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.

8. Receive PIN to track investment online [Please (✓)] (refer instruction 8)

Yes No

9. Nominee (available only for individuals) (refer instruction 9)

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

10. Signature (refer instruction 10)

First / Sole Applicant / Guardian

Second Applicant

Third Applicant

Scheme: Regular Plan Institutional Plan Dividend Payout Dividend Re-Investment
 Super Institutional Plan Dividend Sweep Growth Others.....

Cheque / DD No. Date

Amount in words (Rs) Drawn on Bank

Amount in figures (Rs) DD Charges Net Amount Branch Name