



SUNDARAM MUTUAL

SIP Registration / Renewal Form / Modification - NACH / One Time Mandate (OTM)

(First time investors should use this form along with the application form)

Please tick ☒ as applicable:

- ☐ NACH/OTM Form is attached and to be registered in the folio. SIP will start after mandate registration which takes Ten days.
☐ NACH/OTM Form is already registered in the folio. [No need to submit again].

Distributor's ARN & Name	Sub-broker's ARN (code)	Sub-broker Code (internal)	EUIN* (Employee Unique Identification Number)	For Office use only

☐ I/We confirm that the EUIN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned. Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor.

Name of First/Sole Applicant Gender* ☐ Male ☐ Female ☐ Others

Name	132061	Applicant Gender*	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Others	Mobile*	E352389	PIN Code*	
Name		Applicant Gender*	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Others	Mobile*		PIN Code*	
Name		Third Applicant Gender*	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Others	Mobile*		PIN Code*	

Existing Investor Folio No.		New Investor Application No.	
Permanent Account Number (PAN)*		Aadhaar Card Number* / PEKRN	
First/Sole Applicant/Guardian		Central KYC Number	<input type="checkbox"/> CKYC Proof attached (Mandatory)
Second Applicant			
Third Applicant			

Bank Name..... Bank Name..... Bank Name.....
Cheque No..... Dated..... Cheque No..... Dated..... Cheque No..... Dated.....

Please tick ☒ ☐ SIP Registration ☐ SIP with Top-up Registration ☐ SIP-Change in Bank Details (Please provide copy of cancelled cheque and mention relevant SIP details in the form and OTM mandate.)CKYC compliant ☐ Yes ☐ No (if no, please provide CKYC proof/additional documents if not submitted earlier)

Sr. No	Scheme/Plan/Option/Sub-option	SIP Installment Amount (₹)	SIP Date	Frequency	SIP Top Up (Optional)	Start Month/Year	End Month/Year (Default Dec 2031)#
1	Scheme..... Plan..... Option.....		<input type="checkbox"/> 1st <input type="checkbox"/> 7th <input type="checkbox"/> 14th <input type="checkbox"/> 20th <input type="checkbox"/> 25th	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly	Top-up amount \$ ₹..... Top-up Frequency * <input type="checkbox"/> Half-yearly <input type="checkbox"/> Yearly	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/>	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="checkbox"/> Till Further Notice
2	Scheme..... Plan..... Option.....		<input type="checkbox"/> 1st <input type="checkbox"/> 7th <input type="checkbox"/> 14th <input type="checkbox"/> 20th <input type="checkbox"/> 25th	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly	Top-up amount \$ ₹..... Top-up Frequency * <input type="checkbox"/> Half-yearly <input type="checkbox"/> Yearly	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/>	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="checkbox"/> Till Further Notice
3	Scheme..... Plan..... Option.....		<input type="checkbox"/> 1st <input type="checkbox"/> 7th <input type="checkbox"/> 14th <input type="checkbox"/> 20th <input type="checkbox"/> 25th	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly* <input type="checkbox"/> Quarterly	Top-up amount \$ ₹..... Top-up Frequency * <input type="checkbox"/> Half-yearly <input type="checkbox"/> Yearly	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/>	<input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="text" value="YY"/> <input type="checkbox"/> Till Further Notice

Default frequency; *The date may be taken as 31/12/2031 in case the bank needs to input a specific date in their system (refer Guide to investing through SIP)

\$ Top up amount should be in multiples of ₹ 500 only; * Quarterly SIP offers top-up frequency at yearly intervals only

DEMAT Account Details

<input type="checkbox"/> National Securities Depository Ltd.	Depository Participant	
<input type="checkbox"/> Central Depository Services (India) Ltd.	DP ID Number	
	Beneficiary Account Number	

Investor willing to invest in Demat option, may provide a copy of the DP Statement enabling us to match the Demat details as stated in the application form.

Declaration: I/We, having read and understood the contents of the Statement of Additional Information (Scheme Information Document) addends issued to the SID and KIM till date, hereby apply for units under the scheme(s) as indicated in the application form, agree to abide by the terms, conditions, rules and regulations of the scheme(s), agree to the terms and conditions for NACH/OTM, have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment, do not have any existing Mutual SIP investments which together with the current application will result in the total investments exceeding ₹ 50,000 in a financial year or a rolling period of twelve months applicable to PMLA/Aadhaar exempt category of investors. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other model, payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

Consent & Signature for Aadhaar

I/We hereby provide my/our consent to Sundaram Mutual Fund / Sundaram BNP Paribas Fund Services Limited (RTA) for the following:

- a) For validating my Aadhaar Number with UIDAI through an authorized entity.
b) For updating/seeding my Aadhaar number based on the PANs in all my accounts maintained with your Fund for KYC & or related due diligence purpose in line with PMLA requirements, UIDAI guidelines and Account enrichment purpose.

I/We hereby declare that all the particulars given herein are true, correct and complete to the best of my/our knowledge and belief. I/We further agree not to hold Sundaram Asset Management, its sponsor, their employees, authorized agents, service providers, representatives or the distributors liable for any consequences/losses/costs/damages in case of any of the above particulars being false, incorrect or incomplete or in case of my/our not immediately informing any changes to the above particulars. I/We hereby authorize Sundaram Asset Management to disclose, share, rent in any form, mode or manner, all any of the information provided by me/us, including all changes, updates to such information as and when provided by me/us, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the law enforcement authorities and other investigation agencies and SEBI registered intermediaries without any obligation or availing me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

I/We authorize Sundaram Mutual Fund / Sundaram BNP Paribas Fund Services Limited to authenticate data in accordance with UIDAI (Authentication) Regulations. I/We hereby provide my/our consent for sharing the Aadhaar data / information with other Mutual Funds / RTAs for updating the same in my / our folios held with them, now or to be created in future.

I/We further declare that this consent will remain valid for Updation in all my / our existing & new folios serviced by Sundaram BNP Paribas Fund Services Limited.

Signatures [as per Mutual Fund Records / Application]	First Unit Holder's Signature	Second Unit Holder's Signature	Third Unit Holder's Signature
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NACH/OTM Registration

SUNDARAM MUTUAL

For office use only

Tick (✓)	
Create	
Modify	
Cancel	

Sponsor Bank Code		Utility Code	
I/We hereby authorize	SUNDARAMMUTUALFUND	to debit Tick (✓)	<input type="checkbox"/> SB <input type="checkbox"/> CA <input type="checkbox"/> SB-NRE <input type="checkbox"/> SB-NRO <input type="checkbox"/> Others.....
Bank Account No			
④ With Bank	Name of customers bank	IFSC	or MICR

④ an amount of ₹ (in words) ₹

FREQUENCY ☒ Monthly ☒ Quarterly ☒ Half Yearly ☒ Yearly ☒ As & when presented DEBIT TYPE ☒ Fixed Amount ☒ Maximum Amount

⑦ Reference 1 Folio No Phone No

⑧ Reference 2 Application No Email ID

I agree for the debit of Mandate processing charges by the Bank whom I am authorizing to debit my account as per latest Schedule of charges of the Bank.

⑩ PERIOD	Signature Primary Account holder	Signature Account holder	Signature Account holder
From <input type="text" value="DD"/> <input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/>			
To <input type="text" value="DD"/> <input type="text" value="MM"/> <input type="text" value="YY"/> <input type="text" value="YY"/>			
or <input type="checkbox"/> Until Cancelled	1 Name as in bank records	2 Name as in bank records	3 Name as in bank records

• This is to confirm that the declaration has been carefully read, understood and made by me/us. I am authorising the user entity/corporate to debit my account.

• I have understood that I am authorised to cancel/amend this mandate by appropriately communicating the cancellation/amendment request to the user entity/corporate or the bank where I have authorized the debit.

I/We hereby declare that the above information is true and correct and that the mobile number listed above is registered in my/our name(s) and/or is the number that I/we use in the ordinary course. I/We hereby declare that, irrespective of my/our registration of the above mobile in the provider customer preference register, or in any similar register maintained under applicable laws, now or subsequent to the date hereof, I/We consent to the Bank communicating to me/us about the transactions carried out in my/our aforesaid account(s).