

Change of Name Request Form for Non-Individual



SUNDARAM MUTUAL
— Sundaram Finance Group —

1. Folio Number(s)			
2. Existing Name in the Folio (Name as per PAN card)*	FIRST	MIDDLE	LAST
3. Status [Please ✓]	<input type="checkbox"/> Partnership Firm <input type="checkbox"/> Company/Corporate <input type="checkbox"/> Trust <input type="checkbox"/> FII/Sub-Account of FII <input type="checkbox"/> Society/Club		
4. Mandatory Documents as per request	Partnership Firms: <input type="checkbox"/> KYC Letter in new name <input type="checkbox"/> PAN card copy of proprietor in new name <input type="checkbox"/> Certificate of registration <input type="checkbox"/> Partnership Deed <input type="checkbox"/> Board Resolution/ Authorisation to Invest <input type="checkbox"/> List of Authorised Signatories & <input type="checkbox"/> Specimen Signatures <input type="checkbox"/> KYC additional details & FATCA-CRS Annexure for Entities including UBO	Company/Corporate/Trust/FII/Society Club: <input type="checkbox"/> KYC Letter in new name <input type="checkbox"/> Certificate of Incorporation from registrar of companies <input type="checkbox"/> SEBI Registration Certificate (in case of FIIs) <input type="checkbox"/> Memorandum & Articles(in case of Company/Corporate/FIIs) <input type="checkbox"/> Board Resolution/ Authorisation to Invest <input type="checkbox"/> PAN card copy in new name <input type="checkbox"/> List of Authorised Signatories & Specimen Signatures <input type="checkbox"/> Bye-Laws & Trust Deed (in case of Society/Club) <input type="checkbox"/> Trust Deed (in case of Society/Club/Trust) <input type="checkbox"/> KYC additional details & FATCA-CRS Annexure for Entities including UBO	
5. New Name to be Updated (Name as per PAN card)*	FIRST	MIDDLE	LAST

6. Date of Incorporation*	D	D	M	M	Y	Y	Y	Y	7. PAN Number*										
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8. Go Green Services (Save The Future): Please provide Contact Details of First / Sole Applicant

Contact Person for Non Individual Investors	
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E-Mail	
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STD		Telephone		Mobile															
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*Please tick the Family Code for the Mobile Number and Email ID provided *Mandatory Fields
Mobile: Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian **Email:** Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian
 I/We would like to receive Account Statements, Annual Reports and other information by email and SMS updates on mobile Yes No

9. Declaration and Signatures (as existing in records):

I/We request Sundaram Mutual Fund (the fund) to change the name of the unit holder and also update various records in the folio(s) mentioned above due to legal change in name. I/We agree to hold the fund, AMC and registrar harmless and indemnified due to effecting this name change.

Sole/First Holder	Second Holder	Third Holder
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Request Date..... Place.....

Acknowledgement (To be filled in by the investor) Change of Name Request Form	Sundaram Mutual Fund
Received, subject to verification, request for change of name in :	
Folio No: (1) (2)..... (3).....	Time Stamp & Signature