Nomination





Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders Please read the instructions carefully before filling up this form No 1 No 2 Nominate the person(s) more particularly described hereunder to receive the Units held my/our Folio/s listed below in the event of my / our death and/or Cancel the nomination(s) made by me / us previously in respect of the units held by me/ us in the Folio/s listed below (tick whichever is applicable). ☐ I / We wish to nominate. (Proportion (%) in which units will be shared by each nominee should aggregate to 100%. In case of single nominee default proportion will be 100%.) **Particulars** Nominee 1 Nominee 2 Nominee 3 Name of the Nominee Relationship Allocation (%)** Mandatory Details Address Mobile Number E-mail Identity Number** [Please tick any one and provide details of same] ☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number PAN ☐ Driving License Number Last 4 digits of Aadhaar ☐ Passport Number ☐ PAN ☐ Driving License Number ☐ Last 4 digits of Aadhaar ☐ Passport Number **Additional Details** Date of Birth# Guardian Name (Optional) if % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division / fraction of %, shall be transferred to the first nominee mentioned in the nomination form. Investor can provide any one of the following as the identify number for the nominee(s), copy of the document is not required. • PAN • Driving License Number • Last 4 digits of Aadhaar • Passport Number Mandatory only if the nominee is minor. I/We want the details of my/our nominee to be printed in the statement of holding, provided to me/us by the AMC/DP as follows (Please tick, as appropriate) □ Name of nominee(s) □ Nomination: Yes/Noto operate my account on my behalf, in case of my incapacitation. He/She I hereby authorize is authorized to encash my assets up to% of assets in the account / folio or Rs.....(Optional). □ I / We DO NOT wish to nominate. Nomination Declaration: I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio. DECLARATION & SIGNATURE(S) - As per Mode of Holding^ in Demat Accounts / MF Folio(s) I / We have read the terms and conditions for nomination and hereby nominate the above nominee(s) to receive all the amounts to my / our credits in the event of my / our death. Signature of the nominee(s) acknowledging receipt of my / our credit will constitute full discharge of liabilities in Sundaram Mutual Fund. Sole / First Holder Second Holder Third Holder Name Signature / Thumb^ Impression of holder Witness 1: Name & Address Witness 1

Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI) • E-mail: customerservices@sundarammutual.com (NRI): nriservices@sundarammutual.com

Signature:

Witness 2: Name & Address

Witness 2 Signature:

[^] Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature.