

Systematic Transfer Plan

To be submitted mandatorily: 1. Your FATCA (Foreign Account Tax Compl. KYC acknowledgement is mandatory for all investors w.e.f. 01/01/2011. I including SIP is upto Rs 50,000 per investor in any rolling 12-month perio	However in the case of Micro SIP/Purchase o	f an individual investor (if the total	amount of investment Folio N	
Distributor's ARN & Name Sub-broker C	•	IRN EL	JIN* Transa	action charges For Rs. 10,000 and above: Existing Investor-Rs.100 New Investor-Rs.150
* Declaration for "Execution only" transcation (only where EUIN box is left blank)	eby confirm that the EUIN box has been intentionally left bla standing the advice of inappropriateness,if any, provided by	ank by me/us as this transaction is executed wi the employee/relationship manager/sales perso	thout any interaction or advice on of the distributor/sub broker. Upfror by the	nt commission shall be paid directly e investor to the AMFI-registered utors based on the investors'
First/Sole Applicant/ Second Applicant Applicant		Third Applicant	assessi	ment of various factors including es rendered by the distributor.
Name of First/Sole Applicant Gender* Male	☐ Female ☐ Others	Mobile*		PIN Code*
E-Mail		Mobile		Tilly Code
Name of Second Applicant Gender* Male	Female 🗆 Others			
		Mobile*		PIN Code*
Name of Third Applicant Gender* Male I I	^F emale □ Others │	Mobile*		PIN Code*
Permanent Account Number (PAN)*	Aadhaar Card Number*		Central KYC Number	CKYC Proof attached (Mandatory)
First/Sole Applicant/Guardian		, tory		
Second Applicant		Mandatory		
Third Applicant				
You will receive an account statement by e-mail.	If you wish to receive a physic	cal statement please tick		
Transferring funds from Scheme Sundaram				
Plan: ☐ Regular ☐ Direct ☐ Others:	Option: 🗆 Dividend Payo	out 🗌 Dividend Re-Investr	ment 🗌 Dividend Sweep 🗆	☐ Growth ☐ Bonus
Transferring funds to Scheme Sundaram				
Plan: ☐ Regular ☐ Direct Option: ☐ Dividend Payout ☐ [Dividend Re-Investment 🗆 Dividend S	Sweep ☐ Growth ☐ Bonus	Each STP Amount Rs	
STP Frequency ☐ Daily (Minimum amount Rs 1000 ☐ Monthly (Minimum amount Rs 25		□ Quarterly (Minimum ar	mount Rs 750 Minimum No	of installments 7)
STP Date (for monthly and quarterly options) \square 1 \square 7 \square 14 \square 20 \square 25 STP Period	STP Starting STP Ending M M Y Y Y Y M M Y Y Y Y	OR	notice* (*The date may be taken as case the bank needs to ir date in their system) (reinvesting through SIP)	31/12/2031 in put a specific effer Guide to
	Turn overleaf for Terms			nture (Mandatory)→→→
Acknowledgement Request	Date: DDMMY	YYY	ime Stamp/Seal	
Folio No	☐ Amount			
From:	To:Plan: ☐ Regular ☐ Direct Options: Dividend ☐ ☐ Sweep ☐ Growth ☐ Bonus] Payout ☐ Re-Investment		
Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)	SMS SFUND to			ces@sundarammutual.com ces@sundarammutual.com
www.cundarammutual.com				Sundaram Mutual Fund

www.sundarammutual.com

Sundaram Mutual Fund



Systematic Transfer Plan

Signature

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document/addenda 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 Auto Debit • 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/investments which together with the current application will result
in the total investments exceeding Rs. 50,000 in a financial year or a rolling period of twelve months (applicable for PAN/Aadhar exempt category of
investors). 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.

Applicable to NRIs only: Please (✓) ☐ I/We confirm that I am/We are Non-Resident of Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channels or from funds in my/our Non-Resident External/Ordinary Account/FCNR Account on a ☐ Repatriation Basis ☐ Non-Repatriation Basis.

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, authorised agents, service providers, representatives of 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 intimating/delay in intimating any changes to the above particulars. I/We hereby authorise Sundaram Asset Management to disclose, share, remit 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, or any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities and other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

Investors are requested to note the following terms and conditions with respect to availing STP facility:

1. Schemes available

For the purpose of **Daily STP**, all open ended equity funds and fixed Income funds are eligible as Transferor Scheme(s) or Transferee Scheme(s).

For the purpose of Weekly, Monthly and Quarterly, all open ended fixed income funds are eligible as Transferor Scheme(s) and all open ended equity funds are eligible as Transferee Scheme(s).

Date of transfer

Daily interval (on all business days) for **Daily STP**. Investors should note that in case of Daily STP, the commencement date for transfers shall be the 15th working day from the date of receipt of a valid request and thereafter, transfers shall be effected on all business days at NAV based prices, subject to applicable load. Thus, in the event of an intervening non-business day (e.g. Saturday and Sunday), STP triggers will not take place and consequently the total number of Daily STP instalments opted by the investor will be adjusted to that extent i.e., for e.g. if the investor has opted for 20 instalments and if 5 non business days happen to occur in the intervening period, then only 15 Daily STP instalments shall be triggered. In view of the intervening non business days, investors are advised to extend the period by including possible non business days during the transfer period for covering the intended instalments. Every Wednesday for **Weekly STP**. If Wednesday is a non-business day then on immediate next business day.

For **Monthly and Quarterly STP** on any date as chosen by the investor from the designated dates which are 1, 7, 14, 20 and 25.

Weekly, monthly and quarterly STPs will start on a day as mentioned above falling not later than the 15th working day from the date of receipt of a valid request.

3. Minimum amount of transfer

Daily: Investors are required to instruct for a minimum of 20 transfers of Rs.1000/- and in multiples of Rs.100/- thereafter.

Weekly: Minimum amount Rs 1000 and 6 instalments

Monthly: Minimum amount Rs 250 Minimum No of installments 20 Quarterly: Minimum amount Rs 750 Minimum No of installments 7

First / Sole Applicant / Guardian

Second

Applicant

Applicant

Request Date

4. Load Structure, for all frequencies, of the Transferor Scheme & Transferee Schemes as on the date of enrolment of STP shall be applicable.

5. Discontinuation of STP, for all frequencies

- a) STP will be automatically terminated if all units are liquidated or withdrawn from the Transferor Scheme or pledged or upon receipt of intimation of death of unit holder. Further, if the outstanding balance in "transferor Scheme" does not cover any of the STP instalment amount, all outstanding units will be liquidated and STP will be effected for such outstanding balance and STP will be terminated for subsequent instalments.
- b) Investors can also choose to terminate the STP by giving a written notice of at least 7 Business Days in advance to the Official Points of Transactions and accordingly, termination of STP shall be effected from 8th Business Day of receipt of valid request.
- The provision of 'Minimum redemption amount' specified in the SID of Transferor Scheme and 'Minimum application amount' specified in the SID of the Transferee Schemes will not be applicable for STP.
- The Trustee / AMC reserve the right to change / modify the terms of the STP or withdraw this facility from time to time.
- 8. Please refer to the respective scheme KIM / SID for more details.

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Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)

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Sundaram Mutual Fund