

Investor details

Common Application Number	<input type="text"/>	(or) Folio Number	<input type="text"/>
Name of First Applicant	<input type="text"/>	Permanent Account Number (PAN)	<input type="text"/> <input type="checkbox"/> KYC Proof attached (Mandatory)
Name of Guardian (in case of First / Sole Applicant is a Minor)/Contact Person-Designation (in case of non-individual Investors) / POA Holder Name	<input type="text"/>	Date of Birth	<input type="text"/>
Name of Second Applicant	<input type="text"/>	Permanent Account Number (PAN)	<input type="text"/> <input type="checkbox"/> KYC Proof attached (Mandatory)
Name of Third Applicant	<input type="text"/>	Permanent Account Number (PAN)	<input type="text"/> <input type="checkbox"/> KYC Proof attached (Mandatory)
		Date of Birth	<input type="text"/>

Additional KYC details (Mandatory) Individual Non-Individual (Please attach mandatory Ultimate Beneficial Ownership (UBO) declaration form)

a. Status of First/Sole Applicant [Please (✓)] Listed Company Unlisted Company Individual Minor through guardian HUF
 Partnership Society/Club Company Body Corporate Trust Mutual Fund FPI
 NRI-Repatriable NRI-Non-Repatriable FII/Sub account of FII Fund of Funds in India QFI Others _____ (please specify)

b. Occupation Details [Please (✓)] (To be filled only if the applicant is an individual)

First Applicant	<input type="checkbox"/> Private Sector Service	<input type="checkbox"/> Public Sector Service	<input type="checkbox"/> Government Service	<input type="checkbox"/> Business	<input type="checkbox"/> Professional	<input type="checkbox"/> Agriculturist
	<input type="checkbox"/> Retired	<input type="checkbox"/> Housewife	<input type="checkbox"/> Student	<input type="checkbox"/> Forex Dealer	<input type="checkbox"/> Others _____ (please specify)	
Second Applicant	<input type="checkbox"/> Private Sector Service	<input type="checkbox"/> Public Sector Service	<input type="checkbox"/> Government Service	<input type="checkbox"/> Business	<input type="checkbox"/> Professional	<input type="checkbox"/> Agriculturist
	<input type="checkbox"/> Retired	<input type="checkbox"/> Housewife	<input type="checkbox"/> Student	<input type="checkbox"/> Forex Dealer	<input type="checkbox"/> Others _____ (please specify)	
Third Applicant	<input type="checkbox"/> Private Sector Service	<input type="checkbox"/> Public Sector Service	<input type="checkbox"/> Government Service	<input type="checkbox"/> Business	<input type="checkbox"/> Professional	<input type="checkbox"/> Agriculturist
	<input type="checkbox"/> Retired	<input type="checkbox"/> Housewife	<input type="checkbox"/> Student	<input type="checkbox"/> Forex Dealer	<input type="checkbox"/> Others _____ (please specify)	

c. Gross Annual Income (in ₹) [Please (✓)]

First Applicant Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs > 25 Lacs - 1 Crore > 1 Crore (or)
 Net-worth (Mandatory for non-individuals) ₹ _____ as on (Not older than one year)

Second Applicant Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs > 25 Lacs - 1 Crore > 1 Crore (or) Net-worth _____

Third Applicant Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs > 25 Lacs - 1 Crore > 1 Crore (or) Net-worth _____

d. **First Applicant:**
For Individuals [Please (✓)] Politically Exposed Person (PEP) Status (Also applicable for authorised signatories/Promoters/Karta/Trustee/Whole time Directors) I am PEP I am related to PEP Not Applicable
For Non-Individuals providing any of the below mentioned services [Please (✓)]
 Foreign Exchange/Money Changer Services Gaming/Gambling/Lottery/Casino Services Money Lending/Pawning None of the above

Second Applicant: (To be filled only if the applicant is an individual) I am PEP I am related to PEP Not Applicable
Third Applicant: (To be filled only if the applicant is an individual) I am PEP I am related to PEP Not Applicable

Declaration

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 agree to notify Sundaram Mutual Fund / Sundaram Asset Management Company Limited immediately in the event the information in the self-certification changes. 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, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities, other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same.

Signatures In case of non-individuals, signature of Authorized Signatories (with Company/Trust/Firm/Body Corporate seal)

First / Sole Applicant / Guardian*	Second Applicant	Third Applicant

Date Place

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