

SUNDARAM PMS – SWITCH – Temporary Online transaction request

Distributor Name	
Client Name (please add joint holder name if applicable)	
First Holder PAN	
PMS Account Number	

Switch Request	
Full / Partial	
If it is Partial, please mention the amount to be switched	Rs.
From Strategy	To Strategy

Terms & Conditions:

1. This facility is enabled in view of the nationwide lockdown imposed in India and is temporary.
2. Transaction requests pertaining to switch transactions only will be accepted from the registered email ID **OR** from a distributor with necessary trail mail from registered email ID of investor and considered as valid request.
3. Investors may avail the services by written request or mention the details in the email and send the same to the designated email ID of Sundaram PMS pmsoperation@sundaramalternates.com for processing.
4. The applications must be complete in all respects.
5. Sundaram Alternates (SA) shall not verify the identity of the person sending the email requests and shall consider the email so received from the sender as valid. However, Sundaram Alternates (SA) will attempt to call the investor to reconfirm the intent before proceeding with the transaction.
6. The time on the email received in mailbox of said email id will be considered as the time stamp.
7. The physical/original ink signed document (Switch Request Form) must be submitted by the Investor to SA or their Financial Advisor (distributor) who in turn should send the same to SA Head Office at Chennai once normal activities are resumed.
8. SA shall take necessary controls and enquires with the investor for the transactions received through the designated mail IDs and shall act in good faith and shall take appropriate steps in connection with the email requests received regardless of the value involved and the same shall

be binding on the Investor. SA will be held harmless for any loss if any, suffered by the Investor for processing such transactions.

9. In case there is a variation between the documents received vide email as against the original/physical documents received thereafter, SA reserves the right to process the transaction as per the documents received vide email and the financial loss if any, due to any such variation shall be entirely borne by the Investor and SA shall under no circumstances be liable for such losses.
10. The Investor acknowledges that it is an electronic service and that transmissions may not be properly received and may be inadvertently read. Investor hereby agrees that the risk of misunderstanding and errors shall be borne by the Investor and SA shall not be responsible for such breach and shall not be liable for any claims, liability, loss, damage, cost or expenses arising from such misunderstanding or errors caused in transmission.
11. Investor shall indemnify SA from and against all claims, liability, loss, damage, cost and expenses incurred by the AMC arising out of or relating to SA acting pursuant to, in accordance with or relying upon any email requests received or AMC not processing the email requests for any reason.
12. Apart from the above, all other terms and conditions in agreement entered with SUNDARAM PMS will remain unchanged.