



Date

**Existing PMS Account Details (Mandatory)**

Distributor Name

Client Name

PAN Number of the Client

PMS Account Number

**Switch Request**

I/we wish to switch our PMS investments, as per details enclosed below:

From Portfolio	To Portfolio	₹ lakhs or %

**Terms & Conditions:**

- I/We understand the investment objectives under the new strategy and have read and understood the Disclosure Document.
- I/We understand that the Portfolio Manager may at its discretion transfer the assets in the same form (funds and / or securities) as under the existing strategy or may liquidate any / all securities managed under the existing strategy at fair market value and there after the funds and / or securities standing to my/our credit (net of all expenses) may be invested as per the new strategy. I/We further confirm that the Portfolio Manager is not responsible for any capital gains / loss arising out of such transfer/sale of assets.
- The holding pattern of investments in the new strategy will be as per the existing investments and demat account's holding pattern.
- No change / addition or deletion of names will be allowed in the pattern of investments.

**Fees & Charges**

Management Fee (P.A) (Accrued Daily Billed Monthly)	.....%
Exit Charges (FIFO Method)	
If exited within 1 year	
If exited within 1-2 years	
If exited within 2-3 years	
Performance Fee Applicable (if yes please fill up below details)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Hurdle Rate (High water mark level)	Upto____%
Performance Fee	____% of profit over hurdle rate

For investments made through distributor - I am / we are aware of the commission to be earned by the distributor with respect to my / our investments with Sundaram PMS.

All applicable taxes will be charged at prevailing rates from time to time.

All other terms and conditions of the PMS agreement executed by me/us, shall be in full effect and continue to be binding upon the parties hereto.

I/We confirm that there is no change in the KYC details submitted by me/us at the time of account opening.

Signature of all the holders of the PMS account is mandatory.

(Client to write in his/her own handwriting as follows: **"I/We have read and understood the fee structure & accept the same"**)

Regards,

Name & Sign of First / Sole Holder	Name & Sign of Second Holder	Name & Sign of Third Holder