



Date | D | D | M | M | Y | Y | Y | Y

Distributor Name

Client Name

PAN Number of the Client

PMS Account Number (s)

Please arrange for closure of my Portfolio Management account held with you & arrange to credit the proceeds as per details enclosed below. Tick the appropriate column and fill the relevant details:

Partial Closure

Portfolio Name (s):.....

Please mention the Amount you would like to withdraw as Partial Closure

Amount in words

*Full Closure

Portfolio Name (s):.....

<input type="checkbox"/> Cash Mode	<input type="checkbox"/> Stock Mode
Bank Mandate:	NSDL / CDSL
Bank Name:	Target DP Name
Account Number:	DP ID
IFSC Code:	CLIENT ID
Attach a cancelled copy of cheque leaf with name(s) printed on the cheque	Attach a copy of Target DP CML and a cancelled copy of cheque leaf with name(s) printed on the cheque

- Please ensure all details are filled in completely and signed by all the holders of the PMS account (in case of joint/multiple holding).
- Redemption requests received before 10:30 AM will be processed on same day subject to authentication of details.
- In case of stock transfer, client name(s) given in the target DP should match with that of the existing DP.
- In case of partial closure, post the partial redemption a minimum limit of ` 50 lakhs as residual AUM is required to be maintained in the client's overall portfolio account as per SEBI Guidelines.
- In case of full redemption, please note that for any stocks which are pending settlement on date of redemption due to purchase or corporate action (stock demerger, split, bonus issue, dividends, etc.), these will be settled subsequently after realization of sale proceeds.
- In the event of full redemption from my /our account, we agree that the clauses of the Portfolio management Agreement with regard to termination of the said agreement shall be binding upon me/us and I / we hereby give our consent for closing the trading / demat / bank account/s and undertake to submit the necessary forms. We agree that Sundaram Portfolio Manager has the discretion to sell securities held

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

*Additional documents in case of full closure: Notice for Termination of Agreement and POA Bank Closure Form (for NRIs only)
 Demat closure form Trading Account closure form (for NRIs only)