

NAME CHANGE REQUEST FORM (1/2)

Please read instructions carefully and strike off sections that are not applicable.

Date

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FOLIO NOS.

No. 1

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 No. 2

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 No. 3

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* Name as per PAN/ITD Records

1st/SOLE UNITHOLDER

Current Name in Folio PAN

* Name to be corrected / changed to NAME AS PER PAN

2nd UNITHOLDER

Current Name in Folio PAN

* Name to be corrected / changed to NAME AS PER PAN

3rd UNITHOLDER

Current Name in Folio PAN

* Name to be corrected / changed to NAME AS PER PAN

REASON FOR NAME CHANGE / CORRECTION (Please ✓)

Name Correction# Name change due to Marriage# Name change due to Divorce# Others# _____ Please specify _____

The name in folio & Bank should be identical

IN CASE OF BANK CHANGE

Bank A/c No.

Account Type (Please ✓) Savings Current NRE NRO Others _____ (please specify)

Bank Name _____ Bank City _____

IFSC (11 digits) MICR (9 digits)

New bank details (Attach any one of the following) (✓)

A cancelled original cheque leaf/self attested copy of cancelled cheque. (Name of the first holder should be printed on the face of the cheque leaf)

Self attested photocopy of bank passbook or bank account statement (Having entries not older than 3 months)

IN CASE OF SIGNATURE CHANGE




Name of the Banker:

Designation: Employee Code:

Signature with Bank seal

INVESTOR(S) DECLARATION & SIGNATURE(S)

I/we hereby declare and confirm that the information provided in this form is true and correct and is duly supported by the document proof enclosed alongwith the form. In case of non submission of any of the documents or if the documents are not found to be in order, the AMC is reserves to right to not register the application submitted. The AMC/Mutual Fund shall not be liable and/or responsible for any loss or damage that I/we may incur if the Form is rejected.

 SIGNATURE OF SOLE/FIRST UNITHOLDER	 SIGNATURE OF SECOND UNITHOLDER	 SIGNATURE OF THIRD UNITHOLDER
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CON_V2 Sept. 2024

NAME CHANGE REQUEST FORM received from:

Folio Nos.

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(subject to verification of documents)

Signature, Date & Stamp

Reason for Name / Signature Change	Documents required
Name Correction	a. Duly filled and signed form
	b. A self-attested PAN card copy with new name and KYC verified with new name.
	c. Original cancelled cheque copy from the investor with his / her name and account number clearly printed on the cheque. The name should match with the name change requested by the Investor.
	d. In absence of such a Cheque, banker attested form to be provided, confirming the Investors Name, Bank branch, Account number and Signature.
	e. Notarized in original / Gazette attestation on the copy of Notification in Official Gazette of India (Or) Affidavit for name change (100 Rs) duly Notarised. This is required only in case of major name correction (Additional of middle name / last name not due to marriage / divorce).
Name change due to marriage	a. Duly filled and signed form
	b. Notarized copy of the marriage certificate
	c. Notarized in original / Gazette attestation on the copy of Notification in Official State Gazette. This is required only in case of marriage certificate is not available.
	d. A self-attested PAN card copy with new name and KYC verified with new name
	e. Cancelled Cheque of registered bank with changed name. In case the bank details are changed, furnish new details and provide cancelled cheque of new bank.
	f. Change in signature, please update through Non-Financial Request Form along with banker attestation.
Name change due to divorce	a. Duly filled and signed form
	b. Notarized copy of the divorce certificate, OR
	c. Family Court Order with Court seal duly notarized
	d. A self-attested PAN card copy with new name and KYC verified with new name
	e. Cancelled Cheque of registered bank with changed name. In case the bank details are changed, furnish new details and provide cancelled cheque of new bank.
	f. Change in signature, please update through Non-Financial Request Form along with banker attestation
	g. In case of divorce decree, all holders should sign the name change request.
<ul style="list-style-type: none"> • In case of non-submission of any of the documents or if the documents are not found to be in order, the AMC reserves the right to not register the name correction application submitted. 	