Change of Name / Signature (For Individuals only)

EDELWEISS MUTUAL FUND

Sponsor: Edelweiss Financial Services Limited | **Trustee Company:** Edelweiss Trusteeship Company Limited | **Investment Manager:** Edelweiss Asset Management Limited
Edelweiss Mutual Fund, Edelweiss House, Off. C.S.T Road, Kalina, Mumbai - 400 098, Maharashtra. | **Website:** www.edelweissmf.com

Incase of multiple folios, ensure bank account details in all folios are matching.
Use separate form incase bank account details are different across folios.

Date : D D M M Y Y Y Y

Applicant Details (Mention your old Name here in case of Change of Name request)

Folio No.

Sole/1st holder details Name _____ PAN

2nd holder details Name _____ PAN

3rd holder details Name _____ PAN

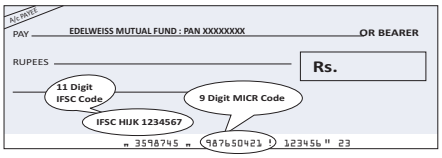
Bank Account Details: (Bank details to be registered in folio)

Bank Name _____

Branch & Address _____

_____ City _____ Pin

Payment Location _____



Bank A/c. No.

A/c Type (✓) ☐ Savings ☐ Current ☐ NRO ☐ NRE ☐ NRNR ☐ Others (Pl. specify) _____

MICR Code (9 Digit) IFSC Code (11 Digit)

Attach any one of each existing and new pre-printed bank proof

☐ Cancelled Cheque with Name pre-printed ☐ Bank Statement ☐ Pass Book ☐ Bank Certificate

Banker's Attestation for Signature & Bank Account Details

Name of Banker _____

Designation _____

Employee code _____

Signature with Bank's Seal

Applicant Details: (Mention your old name here in case of Change of Name Request)

	Sole / 1st Unit Holder	2nd Unit Holder	3rd Unit Holder
Old Name/s (as per existing records)			
New Name/s (don't fill this section in case of change of signature only)			
Old Signature/s (as per existing records)			
New Signature/s (don't fill section in case of change of name only)			

Acknowledgement

EDELWEISS MUTUAL FUND

Received, subject to verification request to: ☐ Change of Name ☐ Change of Signature

From _____

Folio No.

ISC Time Stamp & Signature

Instructions:

1. Separate form to be filled for separate folios. Use separate form for multiple folios if bank account details are different.
2. This form is only for Change of Name / Signature. For changing any other details like change of contact details, address, etc. fill separate forms as available on the website.
3. Following documents need to be submitted for the change of signature
   - Duly signed request letter from Investor.
   - Self-attested Govt. issued Photo ID proof - e.g.: PAN Card, Passport etc., where the signature tallies with the new signature of the investor.
   - Signature attestation letter from Bank.
4. Following documents need to be submitted for the change of name:

Documents	Individual - Other Reasons	Marriage / Divorce	Non-Individual
Request letter / Form signed as per mode of holding.	Yes	Yes	Yes
New bank details-Original cancelled cheque copy from the investor with his / her name printed on it. OR Attested letter from the bank on the original letter head. OR Self-attested copy of latest bank statement or bank passbook with current entries not older than 3 months	Yes	Yes	Yes
PAN Proof and KYC on the new name.	Yes	Yes	Yes
Notarised copy of notification in Official Gazette of India.	Yes	No	No
Notarised copy of Marriage Certificate / Divorce deed	No	Yes	No
Certificate of Incorporation & Certificate of name change in case of companies	No	No	Yes
Board Resolution & Authorised Signatory List	No	No	Yes
Memorandum & Articles of Association / Trust deed / Partnership deed etc.	No	No	Yes
The entry in the Register of Firms (In case of a partnership firm)	No	No	Yes

5. The above documents shall be submitted in original. If copies are furnished, the same must be submitted at the ISCs where they will be verified with the original documents to the satisfaction of the Fund. The original documents will be returned across the counter to the Unit Holder after due verification. In case the original of any document is not provided for verification, then the copies should be attested by the bank manager with his / her full signature, name employee code, bank seal and contact number.
6. In the event of a request for change in Name / Signature being invalid / incomplete / not satisfactory in respect of signature mismatch / document insufficient / not meeting any requirement, the request will be liable for rejection.