

REQUEST FORM FOR CHANGE IN GUARDIAN OF MINOR UNITHOLDER



Please read the instructions carefully and complete the relevant section legibly in black / dark coloured ink and in BLOCK LETTERS.

To:
Union Mutual Fund

Dear Sir/Madam,

I/We request you to note the change in the guardian of the below-named minor unitholder in your records for the reason indicated hereinbelow:

Name of the Minor Unitholder			
Folio No.			
Name of the new Guardian			
PAN of the new Guardian			
Contact details	Mobile No. _____	Tel. No. _____	STD - _____
	Email Id. _____		
Relationship with the Minor	☐ Father ☐ Mother ☐ Legal Guardian Please tick [✓] whichever is applicable		
FATCA and CRS information of the new Guardian			
Country of Birth _____ Place of Birth _____ Nationality _____			
Are you a tax resident of any country other than India? ☐ Yes ☐ No			
If Yes, please mention all the countries in which you are resident for tax purposes and the associated Taxpayer Identification Number and its identification type in the column below			
Country	Tax-Payer Identification Number	Identification Type	
Reason for request for change in Guardian	☐ With mutual consent with the existing guardian (who has signed below). ☐ Consequent on demise of the existing guardian. ☐ Pursuant to appointment of a Legal guardian by a competent court.		
Signature of the new Guardian	I hereby give my consent and will not hold the Fund/AMC/RTA towards any liability by registering myself as the new guardian for the minor's folio as mentioned above. New Guardian's Signature		
Attestation of signature of new Guardian by existing Guardian (if change in the guardian is with mutual consent)			
Name of the existing Guardian (as registered in the Minor's folio)			
Existing Guardian: Consent / No Objection (NoC)	I, being the existing registered guardian of minor in the folio number(s), details as mentioned above, hereby give my consent and have No Objection and will not hold the Fund/AMC/RTA towards any liability by registering a new guardian for the minor's folio as mentioned above. Signature of Existing Guardian		

IPV - In Person Verification at Union MF / CAMS Offices (For Office Use)

Checklist: ☐ IPV done for _____ <Name> ☐ Client verification In Person with PAN Card/ Photo Identification Proof (_____ please specify) ☐ PAN Card/Photo Identification Proof verified with original ☐ Signed on copies in official's presence	IPV done by: Name: _____ Designation: _____ Organization: _____ Employee No: _____ Location: _____ Date of IPV: _____ Official signature, with Company Seal
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ACKNOWLEDGEMENT SLIP

We acknowledge the receipt of the request for change of Guardian of Minor Unitholder

Mr. / Ms. _____ in Folio

No. _____ with Union Mutual Fund. [subject to scrutiny and verifications].

Enclosed: _____



Collection centre's stamp with
date and time of receipt

Documents Attached

- ☐ Copy of PAN Card of the new Guardian
- ☐ KYC Acknowledgment of new Guardian
- ☐ Attested* copy of Death Certificate of the Guardian (if applicable)
- ☐ Attested* copy of the court order if the change guardian is due to appointment of Legal Guardian by the court.
- ☐ Documentary evidence showing relationship of the new Guardian with the Minor (*such as the minor's Passport/ birth certificate/ PAN Card / School Leaving Certificate etc. of wherein name of the new guardian is mentioned*)
- ☐ A cancelled cheque evidencing the change of guardian in respect of the minor's registered bank account with the new Guardian's name.

**To be submitted in original or photocopy duly notarized or attested by gazette officer*

Please address all future communication(s) in connection with this application to the Registrar & Transfer Agent of the Scheme:

Computer Age Management Services Ltd.,

Unit: Union Mutual Fund

Rayala Tower 2, 5th Floor, # 158 Anna Salai, Chennai - 600002.

Email: enq_uk@camsonline.com | **Website:** www.camsonline.com

Union Asset Management Company Pvt. Ltd.

Unit 503, 5th Floor, Leela Business Park, Andheri Kurla Road,
Andheri (East), Mumbai - 400059

Toll Free : 1800 200 2268/1800 572 2268 | **Tel No. :** 022 67483333

Website: www.unionmf.com | **Email :** investorcare@unionmf.com

