

CHANGE OF SIGNATURE / NAME : REQUEST FORM

For Individuals / NRIs / Sole Proprietors / HUF-Karta



1.	Folio No(s)			
2.	Name of the Sole/First Unit Holder			
3.	Status [Please shade (●)]	☐ Individual ☐ NRI ☐ Sole Proprietor ☐ HUF (Karta's Signature)		
4.	Change For [Please shade (●)]	☐ Sole/First Unit Holder ☐ Second Unit Holder ☐ Third Unit Holder		
5.	Request For [Please shade (●)]	☐ Change of Signature ☐ Change of Name		
6.	PAN No. of holder requesting change			
7.	Reason for change			

8.	Bank Account Details for verification (Mention bank details as existing in the above mentioned folio/s)			
	Bank Name			
	Full Bank A/C No			

9.	Provide following details		Provide for ALL holders, even if not changed for all	
	Sole/First Unit Holder	Second Unit Holder	Third Unit Holder	
	New Signature	New specimen signature	New specimen signature	
	Old Signature (As per existing records)	Old signature	Old signature	
	New Name	New name	New name	
	Old Name(s) (As per existing records) (Don't fill this section, in case of change of signature only)	Old name	Old name	

10.	Mandatory documents (to be enclosed) [Please shade (●)]		Provide for ALL holders, even if not changed for all	
	Change of Signature: 1. PAN card copy/ Passport copy [Self attested] And 2. ☐ In-Person Verification (IPV) at Union MF / CAMS Offices, ☐ The Old Bank Account: Self attested Cancelled Cheque / Cheque Copy / Bank statement ☐ Bank Account Registration Form for registering the new bank account			
	Change of Name: 1. ☐ Proof of KYC Compliance with new name OR 2. KYC Change Details Form, with following documents (OR full KYC to be done with all documents, if KYC not done earlier): PAN card copy in New name / Photo identity proof for PAN exempt cases. [Self attested] and Marriage Certificate / Divorce Deed / Gazetted copy of name change, copies duly attested.			
	- Please produce originals for verification, if copies are not attested by Notary/Gazetted Officers/Indian Embassy/Consulate General. - The fund and the RTA reserve the right to call the customer for any additional documents or in-person verification and keep this request or any other transaction in abeyance or reject, pending fulfilment of such requirements. - Please allow upto seven business days for updation of the new signature before submitting a redemption request.			

11.	Declaration and Signature(s)			
I/we request Union Mutual Fund (the fund) to update new name(s) and/or signature(s) in the folio(s) mentioned above and various records as per details mentioned below. I/we hereby agree that new name(s) and/or signature(s) will be valid and effective only after the changes are updated in the system and a confirmation is received by me/us. After the new name / signature updation, any requests with old names/signatures will not be honoured by the fund. Union Mutual Fund will not be responsible for any rejection of Financial (or) Non financial requests on account of any signature mismatch for requests received from the time of receipt of this change request and the updation of this change in our records.				
Signature of all unitholders*				

First Holder	Second Holder	Third Holder

*Where the mode of holding is Joint or Either or Survivor(s)

12.	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

ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Folio No(s)			
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Received, subject to verification and without prejudice, request for updation of new names / signatures in:

Name of the Sole/First Unit Holder

Collection centre's stamp with date and time of receipt

