

CHANGE OF NAME REQUEST FORM

(For Individuals / NRIs / Minor)



**TRUST
MUTUAL
FUND**
CLEAR • CREDIBLE • CONSISTENT

1. UNITHOLDER INFORMATION

Folio No(s).

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2. REASON FOR CHANGE (Refer instructions for mandatory documents to be submitted)

- | | |
|--|---|
| ☐ Incorrectly mentioned in the Application Form | ☐ Name Changed & Notified in the Official Gazette of India |
| ☐ To match the Name as per Income Tax Database | ☐ Surname Changed due to Marriage |
| ☐ Surname Changed due to Divorce | ☐ Others [Please specify] _____ |

3. OLD NAME AND NEW NAME

a. Sole/ First Unit Holder/ Guardian:

Old Name:

Mr.	Ms.	M/S
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New Name:

Mr.	Ms.	M/S
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b. Second Unit Holder:

Old Name:

Mr.	Ms.	M/S
-----	-----	-----

New Name:

Mr.	Ms.	M/S
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c. Third Unit Holder:

Old Name:

Mr.	Ms.	M/S
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New Name:

Mr.	Ms.	M/S
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4. DECLARATION & SIGNATURE(S)

I / We request TRUST Mutual Fund to update new name/s in the folio/s mentioned above and various records as per details mentioned below. I / We hereby agree that new name/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 updation, any request with old names will not be honoured by the Fund.

The processing of above request is subject to my / our signature(s) matching with the registered signature(s) on the records and the new name is as per NSDL records.

(First Unit Holder / Guardian)

(Second Unit Holder)

(Third Unit Holder)

CHANGE OF NAME REQUEST FORM - ACKNOWLEDGEMENT SLIP

Folio No(s).

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(Subject to verification of documents)

Date

D	D	M	M	Y	Y	Y	Y
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Received from:

Mr.	Ms.	M/S
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Stamp & Signature

INSTRUCTIONS

Minor Change in Name:

- ✓ Duly filled and signed form
- ✓ Self-attested PAN card copy with the new name
- ✓ KYC Acknowledgment copy with the new name.

Major Change in Name:

- ✓ Duly filled and signed form.
- ✓ Notarized copy of Notification in Official Gazette of India
- ✓ Self-attested PAN card copy with the new name
- ✓ KYC Acknowledgment copy with the new name.

Name Change as per NSDL / ITD Records:

- ✓ Duly filled and signed form
- ✓ Self-attested PAN card copy with the new name
- ✓ KYC Acknowledgment copy with the new name.

Name Change due to Marriage/ Divorce:

- ✓ Duly filled and signed form
- ✓ Duly verified and notarized / attested copy of Marriage / Divorce Certificate
- ✓ Self-attested PAN card copy with the new name
- ✓ KYC Acknowledgment copy with the new name

Note: Indemnity bond with the stamp value as per the State stamp act, as applicable.

Toll Free Number	Email ID	Website
1800 267 7878	investor.service@trustmf.com	www.trustmf.com

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.