

Change of Name / Signature

For Individuals / NRIs / Sole Proprietors / HUF-Karta



INVESTOR DETAILS	
REQUEST FOR (Please ✓)	☐ CHANGE OF SIGNATURE ☐ CHANGE OF NAME
Folio No.	PAN
Name of the Sole/ First Unit Holder	

BANK ACCOUNT DETAILS FOR VERIFICATION (Bank details registered in the folio)	
Account Number	
Account Type [Please tick (✓)]	☐ Savings ☐ Current ☐ NRE ☐ NRO Bank Name
Branch Name	
Branch Address	
State	City
IFSC Code	MICR Code

OLD AND NEW NAME OF THE UNIT HOLDER/ NEW SPECIMEN SIGNATURE			
	1 st Unit Holder	2 nd Unit Holder	3 rd 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)			

CHANGE OF NAME / SIGNATURE	ACKNOWLEDGEMENT
Received, subject to verification and without prejudice, request for update of :	☐ Change of Name ☐ Change of Signature
Folio No.	
Name of the Sole/First Unit Holder	stamp & signature



Banker Attestation of Customer's signature updation, Bank Account Details
and Customer Address as per bank records
<If provided on Bank's Letter Head, all details as mentioned below should be available>

TO WHOMSOEVER IT MAY CONCERN

This is to certify that the below mention account holder is holding the following account in our bank and branch (should match with bank details in the folio).

Mr. / Ms.	(Name as per PAN)															
S/o or D/o:																
Residing at address (Should match with mutual fund folio address)																
PAN (As per bank records)																
Account Number																
Account Type [Please tick (✓)]	☐ Savings ☐ Current ☐ NRE ☐ NRO ☐ FCNR ☐ Others (please specify)															
Name of the Bank																
Branch Name											Branch City					
IFSC Code																
MICR Code																
Date of Bank Account Opening	D	D	M	M	Y	Y	Y	Y								
Updated Name of the above mentioned A/c holder as per Bank's records											Updated Signature of the above mentioned A/c holder as per Bank's records	Signature				
Signature of the Bank Branch Manager / Authorised Employee:	Signature										Bank & Branch Seal, with Employee name, Employee designation, Employee number					
Date:	D	D	M	M	Y	Y	Y	Y								

Note : If PAN is not available or updated in Bank records: Photo Verification is needed

INSTRUCTIONS

1. Separate forms need to be filled for separate folios of the investor.
2. This form is only for Change of Name/ Signature. For changing any other details like change of contact details, address, bank account details, etc. fill separate forms as available on the website.
3. Following documents need to be submitted for the change of name:

Scenarios	Documents required
Minor correction in name	♦ Duly filled and signed form ♦ Self-attested PAN card copy ♦ Any Document with new /revised name having registered address e.g. KYC acknowledgement letter with address, Passport copy, Election card copy, Aadhar card copy, Utility bills copy, Driving license copy, Registered bank statement copy (All documents to be attested in original)
Major correction in name	♦ Duly filled and signed form. ♦ Notarized copy of Notification in Official Gazette of India (Or) the Copy of advertisement given for name change in 2 newspaper, 1 Regional newspaper and one national, daily newspaper. ♦ A self attested PAN card copy with new name and KYC verified with new name Attestation from the bank manager of the Bank whose mandate has been provided at time original investment, confirming the Investors Name, Bank branch, Account number and Signature. ♦ Any official/legal document reflecting the name change viz. Attested Bank statement from the same bank of which bank mandate is on our record Passport. ♦ For applications made by minor investors - Passport / School Certificate or Birth Certificate (relationship) duly notarized / Official/ Gazette / Magistrate / Bank Manager, AMC
Name change due to marriage	♦ Duly filled and signed form ♦ Notarized copy of the marriage certificate OR Certified true copy of the state Gazette OR the original copy of the state gazette in which a declaration has been made to that effect ♦ A self attested PAN card copy with new name and KYC verified with new name
Name change due to divorce	♦ Duly filled and signed form ♦ Notarized copy of the divorce certificate, OR Family Court Order with Court seal duly notarize ♦ A self-attested PAN card copy with new name and KYC verified with new name

4. The fund and the RTA reserve a 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.
5. Following documents need to be submitted for the change of signature :
 - ♦ Duly signed request letter from investor.
 - ♦ Signature attestation from banker on the banker attestation form.
6. Please produce originals for verification, if copies are not attested by Notary/Gazetted Officers/ Bank Managers/Indian Embassy/Consulate General.