

Folio Number

APPLICANT DETAILS (please mention your old name here in case of Change of Name Request)

Sole / 1st Holder Details

Name PAN

2nd Holder Details

Name PAN

3rd Holder Details

Name PAN

BANK ACCOUNT DETAILS FOR VERIFICATION (Bank details registered in folio)

Bank Account No. A/c. Type (✓) ☐ Current ☐ Savings ☐ NRO ☐ NRE

Bank Name Branch Name

Bank Address

City Pin

IFSC Code (11 digit)* MICR Code (9 digit)* *Mentioned on your cheque leaf

BANKER'S ATTESTATION OF CUSTOMER'S SIGNATURE & BANK ACCOUNT DETAILS

<p>Name of the Banker:</p> <p>Designation:</p> <p>Employee Code:</p>	<p>Signature with Bank's seal:</p>
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OLD & NEW NAMES OF THE UNIT HOLDER / NEW SPECIMEN SIGNATURE

I/We request Capitalmind Mutual Fund to update new name/s and/or signature/s and in the folio/s as per the details mentioned above and below. I/We hereby agree that new name/s and/or signature/s will be valid and effective only after the changes are updated and a confirmation is received by me/us. After the new name/signature audition, any requests with old name/signature will not be honored by the fund.

	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 this section, in case of change of signature only)			

ACKNOWLEDGMENT SLIP

Received, subject to verification request for:

☐ Change of name ☐ Change of name and signature ☐ Change of signature

From

Folio Number

ISC Stamp & Signature

INSTRUCTIONS

1. A separate form must be filled for each folio of the investor. Combined requests across multiple folios will not be accepted.
2. This form is specifically for requesting changes in the name or signature of the investor. For changes in other details (e.g., contact information, address, bank account details, etc.), please use the relevant forms available on our website.
3. To request a change of signature, the following documents must be submitted:
 - A duly signed request letter from the investor.
 - A self-attested copy of a government-issued photo ID (e.g., PAN Card, Passport) where the signature matches the new signature.
 - A signature attestation letter from the investor's bank on their official letterhead, duly signed and stamped by the bank manager.
4. Following documents need to be submitted for the change of name:

Reason for Name / Signature Change	Documents required
General	<ul style="list-style-type: none"> • A written and signed application from the investor clearly stating the request for name change. • Certified true copy of the state Gazette / The original copy of the State Gazette in which the name change declaration has been published / Affidavit on a 100 non judicial stamp paper duly notarized in original • If the name change also involves a change in signature, a signature attestation from the bank is required, confirming the new signature of the investor. • A copy of the PAN card reflecting the new name, and Verified KYC in the updated name.
Name corrections	<ul style="list-style-type: none"> • Duly signed request letter by the investor • A copy of the PAN card reflecting the new name, and Verified KYC in the updated name with any of the following: Ration card / Election Card / Passport / Aadhar Card / School transfer certificate / standard 10th or 12th certificate
Post Marriage	<ul style="list-style-type: none"> • Duly signed request by the investor (The request must be signed by the investor and should include The maiden name/signature, and The new name/signature (if changed post-marriage)) • A certified copy of the Marriage Certificate, duly attested. • The new signature must be attested by the investor's banker with the following details: Bank stamp, Official designation of the signatory, Employee code, and Contact number. • Complete bank details along with personalized cancelled cheque leaf of the new bank account (with pre-printed name and account number). • Copy of the PAN card and Verified KYC in new name
Divorce	<ul style="list-style-type: none"> • Duly signed request by the investor (Request should be accompanied with both old and new signature- in case of change in signature post-divorce) • Certified copy of Divorce decree duly notarized • New signature (post change in name – if applicable) attested by the banker with complete details(stamp, designation, employee code) • Complete updated bank details, accompanied by a personalized cancelled cheque leaf that has the investor's printed name. • Copy of PAN card in the new name, and Verified KYC reflecting the updated name. <p>Please note that divorce decree will suffice only if the last name is changing as a result of divorce. If the investor is changing both the first and last name due to divorce, one of the following additional supporting documents must be submitted:</p> <ul style="list-style-type: none"> • A certified true copy of the State Gazette Notification • A Marriage Certificate reflecting The maiden name, and The post-marriage name

5. All the required documents must be submitted in original form. If copies are furnished, these must be presented at the Investor Service Centres (ISCs) for verification against the originals to the satisfaction of the Fund. Upon successful verification, the original documents will be returned immediately to the Unit Holder. In the absence of original documents for verification, the copies must be attested by the investor's bank manager and must clearly include Full signature of the bank official, Name, Employee code, Bank seal, and Contact number.
6. The request for change in Name and/or Signature may be rejected if any of the following apply: The application is incomplete or invalid/There is a signature mismatch/ The documentation submitted is insufficient, unclear, or not in accordance with requirements/ Any of the stipulated criteria or procedural guidelines mentioned above are not met.