

Request Form for Change in Guardian of Minor Unitholder

To: _____ Mutual Fund

Dear Sirs,

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

Name of the Minor Unitholder			
Folio No.			
Name of the new Guardian			
PAN of the new Guardian			
Contact details	Mobile No.+91-_____	Tel. No. STD - _____	
	Email Id. _____		
Relationship with the Minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> 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	<input type="checkbox"/> With mutual consent with the existing guardian (who has signed below). <input type="checkbox"/> Consequent on demise of the existing guardian. <input type="checkbox"/> Pursuant to appointment of a Legal guardian by a competent court.		
Signature of the new Guardian (as per the bank account of the Minor, where the new guardian is registered as the Guardian)			
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)			
Signature of existing Guardian			
Attestation of signature of the new Guardian by the bankers			
Bank Name			
Branch	Bank City		
A/c No.	A/c Type	<input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> Others	
Name* of the Authorised Bank Official	Signature of bank official with Bank's Seal		
Designation*			
Employee Code*			
Tel. Number*			

*mandatory

DOCUMENTS ATTACHED

- ☐ Copy of PAN Card of the new Guardian
- ☐ KYC Acknowledgment OR ☐ KYC form of the 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 duly attested by a Notary Public or a Judicial Magistrate First Class (JMFC) or a Gazetted Officer.