

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 hereinbelow:

| | | |
|---|--|----------------------|
| Name of the Minor Unitholder | | |
| Folio No. | | |
| Name of the new Guardian | | |
| PAN of the new Guardian | | |
| Contact details | Mobile No. _____ Tel. No. <u>STD -</u> _____ | |
| | Email Id. _____ | |
| Relationship with the Minor | <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian <i>Please tick [✓] whichever is applicable</i> | |
| 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 <i>(as per the bank account of the Minor, where the new guardian is registered as the Guardian)</i> | | |
| Attestation of signature of new Guardian by existing Guardian <i>(if change in the guardian is with mutual consent)</i> | | |
| Name of the existing Guardian <i>(as registered in the Minor's folio)</i> | | |
| 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 | |
| Name* of the Authorised Bank Official _____ | Signature of bank official with Bank's Seal | |
| Designation* _____ | | |
| Employee Code* _____ | | |
| Tel. Number* _____ | | |

*mandatory

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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.*