

Request for Change in Guardian

To,
HDFC Mutual Fund.

Date: _____

Dear Sir/Madam,

You are requested to update new guardian details in the folio mentioned below. All the necessary documents have been enclosed for your records.

Folio details:

Folio number	
Minor unit holder's name	
Existing guardian's name	

New guardian's details:

Name (as per PAN)											
PAN											
Relationship with minor	<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Court-appointed Legal Guardian										
Mobile number	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Email ID (please write in capitals)											
Signature attested by the bank mentioned below (with name of the banker, designation, employee code & seal)											

Details of bank account of the minor unit holder with the new guardian:

Bank name																					
Account number	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>																				
A/c Type	<input type="checkbox"/> SB <input type="checkbox"/> CA <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> Others: _____																				
Branch name																					
Bank city																					
IFSC (11 Digit)	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>																				

Please turn over...

Confirmation from the existing guardian:

Note: This section should be left empty in case of the demise of the existing guardian and the Death Certificate should be submitted herewith.

I, _____, registered as the guardian in aforesaid folio of Master/ Miss _____ have no objection in updating the name of _____ as the new guardian in the folio.

Signature of the existing guardian

Documents submitted herewith:

- Proof of existing bank account of the minor **
- Proof of new bank account of the minor **
- KYC proof of the new guardian
- Document evidencing relationship with the new guardian with the minor unit holder
- A copy of the court order (in cases where the new guardian is a court-appointed legal guardian)
- Supplementary KYC, FATCA and CRS Self Certification form from the new parent/legal guardian on behalf of the minor, if not already available.

**** Valid proofs for bank accounts:**

1. Cancelled original cheque leaf (reflecting name and account number)
2. Photocopy of cheque leaf (reflecting name and account number) accompanied with the original cheque leaf for verification at the offices of HDFC Asset Management Co. Ltd.
3. Bank passbook or bank account statement (certified by the bank manager) / letter from the bank for the new bank account /Passbook