APPLICATION FOR CHANGE IN GUARDIAN NAME

IDFC MUTUAL FUND

ARN-4464 E032737 VIKRAM S. BAGADTHEY

I/we, hereby submit the request to change the name of the guardian registered in the below mention folios.

Time Stamping	

MANDATORY

Folio No.		Investor Name	
Current Guardian Name			

NEW GUARDIAN DETAILS

PAN/PEKRN		KYC ID (KIN)	
Relationship with the unitholder			
Reason for change in guardian			

CONTACT DETAILS

Telephone No.	Office No.		Mobile No.	
Email ID				

DOCUMENT TO BE ENCLOSED

Sr. No.	☐ Change to Natural Guardian	Tick (✓)
1	Duly filled form	☐
2a	No Objection Letter from the existing guardian	☐
	OR	
2b	Death certificate attested by Notary of the existing Guardian (in case of death of Guardian)	☐
3	Original Cancel cheque with New Guardian name Printed	☐
4	Relationship proof of the New Guardian with the Minor (School Certificate, Birth Certificate or Passport duly notarized)	☐
5	Specimen Signature of the New Guardian duly attested by the banker.	☐
6	PAN & KYC proof of the New Guardian.	☐
7	Duly filled FATCA form	☐

Sr. No.	☐ Change to Appointed Guardian	Tick (✓)
1	Duly filled form	☐
2a	No Objection Letter from the existing guardian	☐
	OR	
2b	Death certificate attested by Notary of the existing Guardian (in case of death of Guardian)	☐
3	Original Cancel cheque with New Guardian name Printed	☐
4	Court Order / Adoption Deed (as applicable)	☐
5	Specimen Signature of the New Guardian duly attested by the banker.	☐
6	PAN & KYC proof of the New Guardian.	☐
7	Duly filled FATCA form	☐

SIGNATURE & ATTESTATION

Signature of new guardian	Bank Attestation
Name	Branch Seal with attester's name, designation and employee number

INSTRUCTIONS AND CHECKLIST OF DOCUMENTS:

- Duly filled and signed form
- No Objection Letter (NoC) or Consent Letter from existing guardian or Court Order for new guardian, in case the existing guardian is alive.
- Notarized copy or attested copy of the Death Certificate of the deceased guardian, where applicable. The attestation may also be done by a special executive magistrate, AMC authorised official or manager of a scheduled bank.
- The new guardian must be a natural guardian (i.e. father or mother) or a court appointed legal guardian.
- In case of natural guardian, a document evidencing the relationship.
- In case of court appointed legal guardian, a supporting documentary evidence
- Bank attestation attesting the signature of the new guardian in a bank account of the minor where the new guardian is registered as the guardian.
- KYC of the new guardian.

In case of non submission of any of the documents or if the documents are not found to be in order, the AMC reserves the right to not register the name correction application submitted.

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