

CHANGE OF SIGNATURE / NAME: REQUEST FORM

For Individuals / NRIs / Sole Proprietors / HUF-Karta

Folio No Date

Request For (Please ✓): ☐ Change of Signature ☐ Change of Name

Change For ☐ Sole/First Unit Holder/Guardian ☐ Second Unit Holder ☐ Third Unit Holder

PAN No. of holder requesting change

Give details below:

Signature	Old Signature if applicable	New Sign Here
Name	Old name for records	New name for records

Reason for change:

Signature as per mode of holding:

 Signature of 1st/Sole holder	 Signature of 2nd holder	 Signature of 3rd holder
 Name of 1st/Sole holder	 Name of 2nd holder	 Name of 3rd holder

Mandatory documents (to be enclosed)

Change of Signature: 1. ☐ For folio value 2 lac and below: Either bank attestation OR IPV would be required 2. ☐ For folio value above 2 lac: IPV would be required	Change of Name: 1. ☐ KYC – KRA Acknowledgement with New Name, OR 2. ☐ KYC Change Details Form, with following documents (OR full KYC to be done with all documents, if KYC not done earlier): ☐ PAN card copy in New name / Photo identity proof for PAN exempt cases. [Self attested] ☐ Marriage Certificate / Divorce Deed / Gazetted copy of name change, copies duly attested. ☐ Bring original for verification.
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ACKNOWLEDGEMENT SLIP FOR CHANGE OF NAME / SIGNATURE: REQUEST FORM

Received, subject to verification and without prejudice, request for updation of new names / signatures in:

Name of the Sole/First Unit Holder

Folio No/s

ISC Stamp & Signature



IPV Section (In-Person Verification) for Change of Signature

Checklist:

- ☐ IPV done for
- ☐ Client verification In Person with PAN Card/Photo Identification Proof
- ☐ PAN Card/Photo Identification Proof verified with original
- ☐ Signed on copies in official's presence

IPV done by:

Name:

Designation:

Organization:

Employee No:

Location:

Date of IPV:

- The fund and the RTA reserve a right to call the customer for any additional documents or in-person verification and keep this request or any other transaction in abeyance or reject, pending fulfilment of such requirements.
- Please allow upto seven business days for updation of the new signature before submitting a redemption/any other request.

Annexure 1a

BANK ATTESTATION OF ACCOUNT DETAILS & ACCOUNT-HOLDER'S SIGNATURE

{To be issued on the Bank's Letter Head
OR
This form itself with Bank Official's name and Employee code

Date

TO WHOMSOEVER IT MAY CONCERN

This is to certify that Mr. / Ms

is a customer of our bank, namely, Name of the bank Branch

having the following Bank Account:

Account Type ☐ Savings ☐ Current ☐ NRE ☐ NRO ☐ NRNR ☐ Others (Pl. specify)

9-Digit MICR No. 11 Digit IFSC

His/her address, as per our Bank records, is as follows:

City State

Country Pincode

Signature Verification by Bankers

Signature of the above customer in
the box alongside, verified & validated
with his/her specimen signature as
per Bank's records

Name* of the attesting Bank Official

Designation* Employee Code* Telephone Number*

* Mandatory