

REQUEST FORM FOR CHANGE IN GUARDIAN OF MINOR UNITHOLDER



To,
TRUST Mutual Fund
Dear Sir(s),

I/We request you to note the change in the guardian of the 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: + 9 1												Tel. No.										
	Email ID																						
Relationship with the Minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian Please tick [✓] whichever is applicable																						
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.																						

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? Yes No
 If yes, please mention all countries in which you are resident for tax purposes and the associate Taxpayer Identification Number and its identification type in the column below

Country	Tax-Payer Identification Number	Identification Type

Signature of the New Guardian (as per the bank account of the Minor, where the new guardian is registered as the Guardian)	✕												
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"/> FCNR <input type="checkbox"/> Others _____
Name* of the Authorised Bank Official:													
Designation*													
Employee Code* :													
Tel. Number* :	Signature of Bank Official with Bank's Seal												

MANDATORY*

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	

Request Form for Change in Guardian of Minor Unitholder

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 Passbook or Statement can be submitted evidencing the change of Guardian in respect of the minor's registered bank account with the new Guardian's name.
- FATCA, CRS & Supplementary Information

* To be duly attested by a Notary Public or a Judicial Magistrate First Class (JMFC) or a Gazetted Officer.

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ACKNOWLEDGEMENT SLIP



Request for Change in Guardian of Minor Unitholder from _____

_____ for

ISC Stamp & Signature

Folio No. _____ (Subject to verification of documents)