kotak Mutual Fund

Change of Name

LIST OF FOLIO(S)

Holder Status ☐ Sole/ First Unit Holder ☐ Second Holder ☐ Third Holder
Folio No.

Holder Status ☐ Sole/ First Unit Holder ☐ Second Holder ☐ Third Holder
Folio No.

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Holder Status ☐ Sole/ First Unit Holder ☐ Second Holder ☐ Third Holder
Folio No.

Existing Name : _____

New Name : _____

Reason for Change : _____

NEW BANK DETAILS

Bank Name : _____

Account No. : _____

Account Type : _____

Branch/ City : _____

IFSC Code : _____

DOCUMENTS CHECKLIST

- ☐ PAN card copy in the new name
- ☐ Marriage Certificate / Divorce Decree / Gazette copy - duly notarized
- ☐ Original Cancelled cheque leaf with name printed on the face of the cheque
- ☐ FATCA Declaration

IMPORTANT NOTE

- ✓ Form to be signed as per mode of holding in the Folio
- ✓ If there are any changes in the signature, "Signature Updation Form" should be separately submitted.
- ✓ Name should be changed in KYC with status " Verified" (We will be able to update Name as per KYC only)

✖

Signature of First holder | Signature of Second holder | Signature of Third Holder

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