WHITEOAK CAPITAL ASSET MANAGEMENT

Form T1

REQUEST FOR TRANSMISSION OF UNITS

(Deletion of name/s of Joint Holders in case of death of the 2nd or 3rd Holder)

To: Date: _____

The Trustees,

_____ Mutual Fund

Sirs,

Request for deletion of name(s) of the 2nd/ 3rd Holder

Sr.#	Scheme Name	Folio No	No. of Units
1			
2			
3			
4			

I/We, the surviving Unit holder/s in the above schemes/folios regret to inform you the demise of the following joint holder(s) on the dates mentioned below –

Name(s) of the Deceased Unitholder(s)	**Date of demise***
2.Mr./Ms.	DD / MM / YYYY
3.Mr./Ms.	DD / MM / YYYY

A certified copy of his/her/their Death Certificate/s is/are attached herewith.

I/ we, therefore, request you to delete the name/s of the aforesaid deceased unitholder/s in your records and transmit the Units in the abovementioned folios in my/our name/s.

I also request you to update my email and mobile no. in your records as follows:

Mobile No.+91 | | | | | | | | | | **Tel.No.** STD
Email Address

The existing bank account details registered in the above folios may be ☐**Continued***/ ☐**Replaced*** as per attached fresh Bank Mandate Form.

Nomination (Please ✓ one of the options below)

☐ I/We **DO NOT** wish to make a nomination. *(Please tick ✓ if you do not wish to nominate anyone)*
☐ I/We wish to continue the existing nomination made by me/us in the above folios previously.
☐ I/We wish to make a fresh nomination and hereby nominate the person/s more particularly described in the **attached Nomination Form** to receive the Units held my/our folio in the event of my / our death.

Name & Signature of the surviving Unit holder/s

Name	PAN	Signature
1.		✖
2.		

* Please tick (✓) whichever is applicable.

Attachments:

☐ Copy of Death Certificate of the deceased unitholder

☐ Fresh Bank Mandate Form along with ☐ Cancelled cheque of the new bank account

☐ Nomination Form duly completed

☐ KYC of the surviving unit holder(s), ***if not already complied earlier.***