

REQUEST FORM FOR CHANGE IN GUARDIAN OF MINOR UNITHOLDER



Please read the instructions carefully and complete the relevant section legibly in black / dark coloured ink and in BLOCK LETTERS.

To: _____ Mutual Fund

Dear Sirs,

I/We request you to note the change in the guardian of the below-named minor unitholder in your records for the reason indicated hereinbelow:

Name of the Minor Unitholder		
Folio No.		
Name of the new Guardian		
PAN of the new Guardian		
Contact details	Mobile No. _____ Tel. No. _____ STD - _____	Email Id. _____
Relationship with the Minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian Please tick [✓] whichever is applicable	
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? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If Yes, please mention all the countries in which you are resident for tax purposes and the associated Taxpayer Identification Number and its identification type in the column below		
Country	Tax-Payer Identification Number	Identification Type
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.	
Signature of the new Guardian (as per the bank account of the Minor, where the new guardian is registered as the Guardian)		
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		

ACKNOWLEDGEMENT SLIP

We acknowledge the receipt of the request for change of Guardian of Minor Unitholder

Mr. / Ms. _____ in Folio

No. _____ with Union Mutual Fund. [subject to scrutiny and verifications].

Enclosed: _____



Collection centre's stamp with date and time of receipt

Attestation of signature of the new Guardian by the bankers

Bank Name	
Branch	
Bank City	
A/c No.	
A/c Type	<input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRE
Name* of the Authorised Bank Official	Signature of bank official with Bank's Seal
Designation*	
Employee Code*	
Tel. Number*	

*Mandatory

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 cancelled cheque evidencing the change of guardian in respect of the minor's registered bank account with the new Guardian's name.

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

Please address all future communication(s) in connection with this application to the Registrar & Transfer Agent of the Scheme:

Computer Age Management Services Ltd.,

Unit: Union Mutual Fund

158, Rayala Tower 1, 1st Floor, Anna Salai, Chennai - 600002.

Email: enq_uk@camsonline.com | **Website:** www.camsonline.com



Union Asset Management Company Pvt. Ltd.

Unit 503, 5th Floor, Leela Business Park, Andheri Kurla Road, Andheri (East), Mumbai - 400059

Toll Free : 1800 200 2268/1800 572 2268 | **Tel No. :** 022 67483333

Website: www.unionmf.com | **Email :** investorcare@unionmf.com