

# CHANGE OF SIGNATURE / NAME : REQUEST FORM

For Individuals / NRIs / Sole Proprietors / HUF-Karta



1. Folio No(s)

2. Name of the Sole/First Unit Holder

3. Status [Please shade (●)]  Individual  NRI  Sole Proprietor  HUF (Karta's Signature)

4. Request For [Please shade (●)]  Change of Signature  Change of Name

5. Reason for change

6. Bank Account Details for verification (Mention bank details as existing in the above mentioned folio/s)

Bank Name

Full Bank A/C No

7. Old Names, New Names and New Specimen Signatures of ALL holders: Provide for ALL holders, even if not changed for all

	Sole/First Unit Holder	Second Unit Holder	Third Unit Holder
New Signature(s)	New specimen signature	New specimen signature	New specimen signature
Old Name(s) (As per existing records)	Old name for records	Old name for records	Old name for records
New Name(s) (Don't fill this section, in case of change of signature only)	New name for records	New name for records	New name for records

8. Mandatory documents (to be enclosed) [Please shade (●)] Provide for ALL holders, even if not changed for all

**Change of Signature:**

1. PAN card copy/ Passport copy [Self attested] And

2.  In-Person Verification (IPV) at Union MF Offices,  
**OR**  
 Banker's attestation/Letter (mandatory in case of micro investment) (refer format on page 2).

If bank account number mentioned in bank attestation does not match with bank account available in folio:  
 The Old Bank Account: Self attested Cancelled Cheque / Cheque Copy / Bank statement, or Letter from Old Bank  
 Bank Account Registration Form for registering the new bank account

If address mentioned in bank attestation does not match with address updated in folio:  
 Self-attested copy of bank account statement/passbook with new address, not older than three months.

**Change of Name:**

1.  Proof of KYC Compliance 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] and  
 Marriage Certificate / Divorce Deed / Gazetted copy of name change, copies duly attested.

- Please produce originals for verification, if copies are not attested by Notary/Gazetted Officers/ Bank Managers/Indian Embassy/Consulate General.
- The fund and the RTA reserve the 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 request.

9. Declaration and Signature(s)

I/we request Union Mutual Fund (the fund) to update new name(s) and/or signature(s) in the folio(s) mentioned above and various records as per details mentioned below. I/we hereby agree that new name(s) and/or signature(s) will be valid and effective only after the changes are updated in the system and a confirmation is received by me/us. After the new name / signature updation, any requests with old names/signatures will not be honoured by the fund. Union Mutual Fund will not be responsible for any rejection of Financial (or) Non financial requests on account of any signature mismatch for requests received from the time of receipt of this change request and the updation of this change in our records.

**Signature of all unitholders\***

First Holder	Second Holder	Third Holder
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\*Where the mode of holding is Joint or Either or Survivor(s)

10. IPV - In Person Verification at Union MF Offices (For Office Use)

I have verified the above signature against the PAN / Passport of the unit holder and the signature has been made in my presence.

Name: \_\_\_\_\_  
 Designation: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Employee No: \_\_\_\_\_  
 Location: \_\_\_\_\_  
 Date of IPV: \_\_\_\_\_

Official signature, with Company Seal

**ACKNOWLEDGEMENT SLIP** (To be filled in by the investor)

Folio No(s)

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

Name of the Sole/First Unit Holder \_\_\_\_\_

Collection centre's stamp with date and time of receipt




**Banker Attestation of Customer's signature updation, Bank Account Details  
and Customer Address as per bank records**

<If provided on Bank's Letter Head, all details as mentioned below should be available>

**TO WHOMSOEVER IT MAY CONCERN**

This is to certify that

<input type="radio"/> Mr. <input type="radio"/> Ms.	
S/o or D/o:	
Residing at address (should match with mutual fund folio/s address)	
PAN (as per bank records)	

If PAN is not available or updated in Bank records: Photo Verification is needed 

Please affix a recent passport size photograph and sign across it.

The above person is holding the following account in our bank and branch (should match with bank details in the folio)

Bank Name																			
Branch Name																			
Bank A/C No																			
A/C type [Please shade (●)]	<input type="radio"/> Savings <input type="radio"/> Current <input type="radio"/> NRE <input type="radio"/> NRO <input type="radio"/> FCNR <input type="radio"/> Others _____																		
MICR Code																			
IFSC Code																			
Date of Bank Account Opening	D	D	M	M	Y	Y	Y	Y											
Name and Signature of the above mentioned A/c holder as per Bank's records																			

**Attestation of signature by the bank:**

Above signature(s) of Mr/ Ms \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ is/ are attested:

Name of the authorized signatory: \_\_\_\_\_

Designation: \_\_\_\_\_

Employee Code: \_\_\_\_\_

Name of the bank: \_\_\_\_\_

Branch: \_\_\_\_\_

Bank branch email ID: \_\_\_\_\_

Bank branch contact number: \_\_\_\_\_

Signature of the authorized signatory  
with Seal of the bank

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

**Computer Age Management Services Pvt. 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**