

CHANGE OF NAME REQUEST FORM (FOR NON INDIVIDUALS ONLY)



Please read the instructions carefully and complete the relevant sections legibly in black / dark coloured ink and in **BLOCK LETTERS**.
Please strike off unused section(s) to avoid unauthorised use

1.	Folio No.																				
2.	Existing Name in the folio																				
3.	Status	<input type="radio"/> Partnership Firm <input type="radio"/> Company/Corporate <input type="radio"/> Trust <input type="radio"/> FIs																			

Due to change in legal name, I/we request Union Mutual Fund to update new name in the folio and various records as per details mentioned below.

4.	New Name to be Updated																				
5.	Reason for name change																				
6.	Date of Incorporation	D	D	M	M	Y	Y	Y	Y	7.	Permanent Account Number (PAN)										

8.	Updation of Contact Details																			
	Name of the Contact Person																			
	Email id: (in capital) Contact Person for Non individual investors																			
	Mobile	Country/ Area code	Tel. (Off.)	Country/ Area code	Tel. (Res.)	Country/ Area code														

9.	Communication Address (for KYC compliant folios, address will be updated as KYC Registration Agency (KRA) records.)																			
	Address line 1																			
	Address line 2																			
	City																Pincode			
	State																			

10.	NEW BANK DETAILS [Please shade (●)] Mention only incase of any change																				
	Bank Name																				
	Bank A/C No											Bank Branch									
	A/C Type	<input type="radio"/> Savings <input type="radio"/> Current <input type="radio"/> NRE <input type="radio"/> NRO <input type="radio"/> FCNR <input type="radio"/> Others _____ (Please Specify)																			
	Bank City											State									
	IFSC Code											MICR Code									

(IFSC Code is the 11 digit no. appearing on your cheque leaf, mandatory for credit via NEFT/ RTGS) (MICR Code is the 9 digit code next to the cheque no.)

11.	Mandatory Documents, in new name, to be attached: ☞ Documents should be duly certified and attested.																			
	Partnership Firms <input type="radio"/> Proof of KYC compliance <input type="radio"/> Copy of PAN <input type="radio"/> Copy of Partnership Deed <input type="radio"/> Certificate of registration (for registered partnership firms only) <input type="radio"/> Authorised Signatories list with specimen signature <input type="radio"/> Authorisation to invest <input type="radio"/> Proof of the existing bank account registered in the folio and Proof of new bank account with new name.	Company / Body Corporate / Trust / FIs / Banks / Associations <input type="radio"/> Proof of KYC compliance <input type="radio"/> Copy of PAN <input type="radio"/> Certificate of Incorporation from registrar of companies or <input type="radio"/> SEBI Registration Certificate in case of FIs, or <input type="radio"/> Constitution / Registration Document in new name, and <input type="radio"/> Board Resolution /Authorisation to invest <input type="radio"/> Authorised Signatories list with specimen signature <input type="radio"/> Proof of the existing bank account registered in the folio and Proof of new bank account with new name.																		

In case of non-submission of any of the documents or if the documents are not found to be in order, the AMC reserves the right to not register the name change request submitted.

10.	DECLARATION & SIGNATURES:																			
	I/We request Union Mutual Fund (the fund) to change the name of the unitholder in the folio/s mentioned above due to legal change in name. I/We agree to hold the fund, AMC and registrar harmless and indemnified due to effecting this name change.																			
	Sole/First Holder	Second Holder	Third Holder																	

ACKNOWLEDGEMENT

Change of Name: Request Form

Folio No.										
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Received, subject to verification, request for change in name

from _____
to _____

ISC Stamp & Signature