

Change of Name & Signature Request Form

For Individuals / NRIs / Sole Proprietors / HUF-Karta



1. Folio No

2. Request For (Please ✓): ☐ Change of Name ☐ Change of Signature

3. Change For/ Correction For (Please ✓): ☐ Sole/First Unit Holder ☐ Second Unit Holder ☐ Third Unit Holder ☐ Guardian

4. PAN No.

5. Reason for change: _____

6. Give details below:

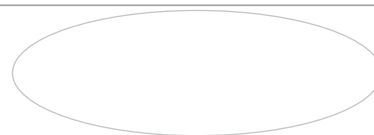
	Old	New
Name	Old name for records	New name for records
Signature	Signature if applicable	Sign Here

7. Signature Verification by Bankers

* Mandatory

Bank & Branch name*			
Bank Account Number*		Account Type*	
Name* of the attesting Bank Official			
Designation*			
Employee Code*			
Telephone Number*			

Signature of the customer in the above box, verified & validated with his/her specimen signature as per Bank's records



Signature of the bank official with Bank's Seal

8. Signature of all holders (As per Mode of Holding in the folio):

Signature of 1st/Sole holder	Signature of 2nd holder	Signature of 3rd holder
Name of 1st/Sole holder	Name of 2nd holder	Name of 3rd holder

9. Mandatory documents (to be enclosed)

Change of Signature*:

- ☐ In-Person Verification (IPV) at CAMS/HDFC AMC Service Centres.
- ☐ PAN card copy / Attested photo identity proof for PAN exempt cases. [Self attested].
- ☐ PAN/ Passport Self attested Photocopy reflecting new signature.

Change of Name*:

- ☐ KYC - KRA Acknowledgement with New Name
- ☐ PAN card copy In New name / Photo identity proof for PAN exempt cases. [Self attested]
- ☐ Duly attested Marriage Certificate / Divorce Decree / Gazetted copy of name change/ Affidavit format to be arrange by legal.

*Kindly provide all original document for verification.

The change in name will be executed subject to name being verified & matched with NSDL records.

10. IPV Section (In-Person Verification) for Change of Signature

(For Office Use)

Checklist:

- ☐ IPV done for Name
- ☐ Client verification In Person with PAN Card/Photo Identification Proof
- ☐ PAN Card/Photo Identification Proof verified with original
- ☐ Signed on copies in official's presence

IPV done by:

Name:

Designation:

Organization:

Employee No:

Location:

Date of IPV:

Official signature, with Company Seal

- The fund and the RTA reserve a 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/any other request.

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) Change of Name & Signature Request Form

HDFC MUTUAL FUND: Head Office : HDFC House, 2nd Floor, H.T. Parekh Marg, 165-166, Backbay Reclamation, Churchgate, Mumbai - 400 020.

DATE

D D M M Y Y Y Y

FOLIO NO.

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

ISC Stamp & Signature

Name of the Sole/First Unit Holder _____

[For any queries please contact our nearest Investor Service Centre or call us at our Customer Service Number 1800 3010 6767 / 1800 419 7676 (Toll Free)]

e-mail us at: hello@hdfcfund.com or visit our website: www.hdfcfund.com Missed Call Number - +91 85069 36767

INSTRUCTIONS

1. This form is only for Change of Name/ Signature. For changing any other details like change of contact details, address, bank account details, etc. fill separate forms as available on the website.
2. Separate relevant documents need to be provided for the respective unit holders.
3. Following documents need to be submitted for the change of signature.
 - Duly signed change of name/signature form from investor.
 - Self-attested Govt. issued Photo ID proof - e.g.: PAN Card, where the signature tallies with the new signature of the investor.
 - Signature attested from registered bank of the Investor in banker's attestation column along with proof.
 - If there is a change in signature of the 2nd and 3rd unit holder(s), a separate banker's attestation needs to be provided along with the bank Valid bank proof.
4. Following documents need to be submitted for the change of name:

Reason for Name / Signature Change	Documents required
General	• Duly filled and signed change of name/signature form by the investor. • Certified true copy of the state Gazette OR the original copy of the state Gazette in which a declaration has been made to that effect. OR Affidavit on non judicial stamp paper of appropriate value duly notarized in original. • Complete bank details (in case of any change in bank details) along with personalized cancelled cheque leaf • New signature (If applicable) should be attested by the investor's bank. (Signature should be attested by the authorized person, mentioning the Designation, Name, Employee code and bank seal of the letter) • Copy of the PAN card and Verified KYC in new name
Name corrections	• Duly filled and signed change of name/signature form by the investor. • Copy of the PAN card and Verified KYC along with any of the following: • Election Card / Passport / Aadhar Card • Complete bank details (in case of change in bank details) along with personalized cancelled cheque leaf
Post Marriage	• Duly signed request by the investor (Request should be accompanied with both the existing signature in our records and new signature - in case of change in signature post marriage) • Original/Notarized copy of Marriage certificate • New signature (If applicable) should be attested by the investor's bank. (Signature should be attested by the authorized person, mentioning the Designation, Name, Employee code and bank seal on the letter) • Complete bank details (in case of change in bank details) along with personalized cancelled cheque leaf • Copy of the PAN card and Valid KYC acknowledgment in new name
Divorce	• Duly signed change of name/signature form by the investor (Request should be accompanied with both old and new signature - in case of change in signature) • Original or Notarized copy of Divorce decree • New signature (If applicable) should be attested by the investor's bank. (Signature should be attested by the authorized person, mentioning the Designation, Name, Employee code and bank seal on the letter) • Complete bank details (in case of change in bank details) along with personalized cancelled cheque leaf • Copy of the PAN card and Valid KYC acknowledgment in new name. Please note that divorce decree will suffice only if the last name is changing as a result of divorce. If both, first and last name, are changing as a result of divorce, investor needs to submit Certified true copy of the state Gazette

5. The above documents shall be Original. If copies are furnished, the same must be submitted at the ISCs where they will be verified with the original documents to the satisfaction of the Fund. The original documents will be returned across the counter to the Unit Holder after due verification. In case the original of any document is not provided for verification, then the copies should be attested by the bank manager with his/her full signature, name, designation, employee code, bank seal and contact number.
6. In the event of a request for change in Name/ Signature being invalid/incomplete/not satisfactory in respect of signature mismatch/document insufficient/not meeting any requirement, the request will be liable for rejection.