

Request Form for Change in Guardian of Minor Unitholder



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																Date of Birth	D	D	M	M	Y	Y	Y	Y
Contact details	Mobile No. _____ Tel. No. _____ STD - _____																							
Email Id. _____																								
This mobile number belongs to (Mandatory Please ✓): ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ POA ☐ Custodian (for FPIs only) ☐ PMS																								
This email id belongs to (Mandatory Please ✓): ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ POA ☐ Custodian (for FPIs only) ☐ PMS																								
Relationship with the Minor	☐ Father ☐ Mother ☐ Legal Guardian Please tick [✓] whichever is applicable																							

BANK ACCOUNT DETAILS

For unit holders opting to hold units in demat form, please ensure that the bank account linked with the demat account is mentioned here.

Bank Name															
Branch Name	Bank City														
Account Number	9 Digit MICR Code														
Account Type (Please ✓) ☐ Savings ☐ Current ☐ NRO ☐ NRE ☐ FCNR ☐ Others (please specify)															
IFSC Code	Mandatory for Credit via NEFT / RTGS (11 Character code appearing on your cheque leaf. If you do not find this on your cheque leaf, please check for the same with your bank)														

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? ☐ Yes ☐ 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

☐ With mutual consent with the existing guardian (who has signed below).

☐ Consequent on demise of the existing guardian.

☐ 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)

ACKNOWLEDGEMENT SLIP FOR SIP (To be filed in by the Investor)

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 Y FOLIO NO. _____ ISC Stamp & Signature

Received from Mr. / Ms. _____

[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

Your Investments, Smarter & Simpler



HDFC Mutual Fund: SEBI Registration Number: MF/044/00/6

Mutual Fund investments are subject to market risks, read all scheme related documents carefully



www.hdfcfund.com

Attestation of signature of new Guardian by existing Guardian <i>(if change in the guardian is with mutual consent)</i>	
Name of the existing Guardian <i>(as registered in the Minor's folio)</i>	
Signature of existing Guardian	

Bank details of New Guardian and Attestation of Signature by the bankers	
Bank Name	
Branch	
Bank City	
A/c No.	
A/c Type	☐ Savings ☐ Current ☐ NRO ☐ 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.*