

Request Form for Change in Guardian of Minor Unitholder

To
Kotak 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. <u>STD -</u> _____
	Email Id. _____	
Relationship with the Minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian <i>Please tick [✓] whichever is applicable</i>	
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 <i>(as per the bank account of the Minor, where the new guardian is registered as the Guardian)</i>		
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		
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"/> NRE <input type="checkbox"/> NRO	
Name* of the Authorised Bank Official _____	Signature of bank official with Bank's Seal	
Designation* _____		
Employee Code* _____		
Tel. Number* _____		

*mandatory

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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.*