

Request Form for Change in Guardian of Minor Unitholder



To:
The Trustees
Bajaj Finserv Mutual Fund

Name of the Minor Unitholder Mr./Ms. _____	
Name of the new Guardian Mr./Ms. _____	
Relationship with Minor: ☐ Father ☐ Mother ☐ Legal Guardian Please tick ☒ whichever is applicable.	
PAN (New Guardian):	Folio No.:

Contact details

Mobile No. +91	Tel.No. STD
Email Address	

FATCA and CRS details

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)

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Attestation of signature of New Guardian by Existing Guardian (if change in the guardian is with mutual consent)

Name of the existing Guardian (as registered in the Minor's folio) Mr./Ms. _____
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Signature of existing Guardian

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Attestation of signature of the new Guardian by the bankers

Bank Name:	
Account No.:	A/c. Type (✓) ☐ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR
Branch:	City: PIN: _____
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.

Note: *To be duly attested by a Notary Public or a Judicial Magistrate First Class (JMFC) or a Gazetted Officer.