

# Request Form for Change in Guardian of Minor Unitholder



To:  
The Trustees  
Bajaj Finserv Mutual Fund

<b>Name of the Minor Unitholder</b> Mr./Ms. _____	
<b>Name of the new Guardian</b> Mr./Ms. _____	
Relationship with Minor: <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian Please tick <input checked="" type="checkbox"/> 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? <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** (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)

<b>Name of the existing Guardian</b> (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 (✓) <input type="checkbox"/> SB <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRE <input type="checkbox"/> 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.