

Change in Guardian Request Form

To
Tata Mutual Fund

Sub: Change in Guardian

Folio No.: _____

Dear Sir,

Please note the change in Guardian due to **Mutual Consent by the existing Guardian / Court appointed Legal guardian / Demise of the existing Guardian** [tick applicable reason].

Details of new Guardian:

Name of the new Guardian* [matching as per KYC records/PAN record]	
PAN of new Guardian*	
Relationship with Minor* [tick any one]	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Court appointed Legal Guardian
Signature of new Guardian* as per the bank account of the minor where the new guardian is registered as the guardian.	
Attestation* of new Guardian's Signature by Bank Manager with Bank Name and Branch seal, Name and Employee Number/Code.	

Bank Particulars	
Bank Name	
Branch	
A/c Type	<input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> FCNR <input type="checkbox"/> Others
A/c No.	
Bank City	
MICR Code (9 Digit)	
IFSC Code (11 Digit)	

* Mandatory

Documents Attached:

- KYC Confirmation Letter / KYC acknowledgment copy for new Guardian. [Mandatory].
- Documentary evidence showing relationship with Minor – Notarized copy of the Birth Certificate / School Leaving Certificate / Mark Sheet issued by Higher Secondary School of respective States, ICSE, CBSE, etc. / Passport of the Minor / PAN Card copy / Any other suitable proof issued by Government Authorities. [Mandatory for other than Legal Guardian].
- **Tick any of the following as applicable**
 - No Objection Certificate [NOC] / Consent Letter from the existing Guardian [if change is due to mutual consent].
 - Notarized copy or attested copy of the Death Certificate of the deceased guardian, where applicable. The attestation may also be done by a special executive magistrate; AMC authorized official or manager of a scheduled bank.
 - Notarized copy of the court order if the change is due to appointment of Legal Guardian by the competent Court. The attestation may also be done by a special executive magistrate; AMC authorized official or manager of a scheduled bank.
- **Attach any *one* of following:**
 - Cancelled Cheque with Name & Account number printed on it.
 - Original Bank statement / Copy of the Bank Statement showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager
 - Copy of Pass book showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager

Note: • If any certificate is issued in the Foreign Country, such certificate should be certified by Indian Embassy to ensure the authenticity of the certification and confirmation that only competent authority has issued the same.