

Annexure – T1: Request letter for transmission

dd-mmm-yyyy

<Mutual Fund Name>

<Address> - <City>

Sub: Request for transmission of units

I/We _____ (claimant name(s) / new Karta Name) solely / jointly would like to inform you that Mr. / Ms. _____ (investor name) in the below mentioned Folio(s) has expired on _____ <dd-mmm-yyyy>. Please transmit the units in my / our favour as per the details given below. We have enclosed the requisite documents as indicated below.

Folio No	No. of units held	Relationship with Deceased

Claimant's Address details#		Claimant's Bank Mandate details#	
Address1*		Bank Name*	
Address2		Branch Name	
Address3		Account Type*	SB / CA / NRO / NRE / FCNR [strike out whichever is not applicable]
City*		Account Number*	
Pin code		IFSC/RTGS Code	
State		ECS MICR No.	
Other Information			
PAN*		Telephone Number(s)	
Email ID		Mobile Number	

*Mandatory. # If there is more than one claimant, this information should be provided for each of the claimant separately.

In case of any deficiencies identified in the submission of the documents, you can write to me/us, or contact us in the above referred address/telephone numbers/email id. We will submit the requisite documents as required for further processing of my request.

Thanking you.

Yours truly,

<Claimant Name(s) with Signature>

Enclosures: (Tick Appropriate)

- Original Death Certificate (DC) or Copy of the DC duly attested by a Notary Public or by a Gazetted Officer
- KYC confirmation letter or KYC acknowledgement letter bearing PAN / PAN Exempt Ref. No and Name of Claimant / Guardian (In case the claimant is a minor)
- For minor Claimant
 - Proof of Age and relationship with Guardian: Birth Certificate / School Leaving / Passport/Other
- New Bank Account Details [Annexure 2]
- Affidavit to effect of identification and claim of legal ownership to the mutual fund units
- For Value Less than or equal to 2 lakhs: NOC Indemnity Family Settlement Deed
- For Value more than 2 lakhs: Legal Heir Certificate Succession Certificate Probate of Will or Letter
 - Administration or Court Decree
- For Value more than 2 lakhs (HUF): Settlement Deed Decree of competent court Deed of partition