

Annexure - T1: Request letter for transmission

Date: / /

The Trustee,
Tata Mutual Fund

Sub: Request for transmission of units

I/We (claimant name(s) / new Karta Name) _____ ;

_____ ;
solely / jointly would like to inform you that Mr. / Ms.# _____
in the below mentioned Folio(s) has expired on / / . 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

1. Claimant's Contact details⁵

Name		PAN/PEKRN <input type="text"/>
Address*		
		PIN <input type="text"/>
City*	State	Country
Residence Phone (prefix STD Code)	Office Phone (prefix STD Code)	Extn <input type="text"/>
Mobile	Email	

2. Claimant's Bank Mandate details⁵

Bank Name		Branch
Account number <input type="text"/>		A/C type <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRNR <input type="checkbox"/> NRE
MICR	IFSC for RTGS	IFSC for NEFT
Address		
City	PIN	State

** 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.

Claimant's Name	Claimant's Signature
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3. Enclosures: (Tick Appropriate)

<input type="checkbox"/> Original Death Certificate (DC) or Copy of the DC duly attested by a Notary Public or by a Gazetted Officer
<input type="checkbox"/> 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) <input type="checkbox"/> For minor Claimant: Proof of Age and relationship with Guardian: <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving <input type="checkbox"/> Passport <input type="checkbox"/> Other _____
<input type="checkbox"/> New Bank Account Details [Annexure 2]
<input type="checkbox"/> Affidavit to effect of identification and claim of legal ownership to the mutual fund units
<input type="checkbox"/> For Value Less than or equal to 2 lakhs: <input type="checkbox"/> NOC <input type="checkbox"/> Indemnity <input type="checkbox"/> Family Settlement Deed
<input type="checkbox"/> For Value more than 2 lakhs: <input type="checkbox"/> Legal Heir Certificate <input type="checkbox"/> Succession Certificate <input type="checkbox"/> Probate of Will or Letter <input type="checkbox"/> Administration or Court Decree
<input type="checkbox"/> For Value more than 2 lakhs (HUF): <input type="checkbox"/> Settlement Deed <input type="checkbox"/> Decree of competent court <input type="checkbox"/> Deed of partition

Name of deceased Unit Holder.