Form 1 - Request for Deletion of name(s) of Joint Holders in case of death of the 1st and 2nd Joint Holders

TATA mutual fund

Date : D D / M M / Y Y Y Y

To:

<Company Name>/<Fund Name>/RTA Name/DP>

<Address>

<City> - <Pincode

Part A – Claimant and Deceased Holder information

DP ID / Client ID / Folio No.	
Deceased Holder Name:	
Claimant Name	
Claimant PAN / PEKRN (Mention only number)	

Dear Sir/Madam,

I/We, the surviving unit holder(s) in the above referred folio(s), hereby inform you about the demise of the following unit holder(s) on the dates mentioned

Name of the deceased unit (joint) holder(s)	PAN	Date of demise
Mr./Ms.		
Mr./Ms.		

I request to delete the name of 1st or 2nd Joint Holder in the following folio(s) held by me.

Sr. No.	Folio No.	Scheme Name	Units Held

I/We also request you to update my email and mobile no. in your records as follows

Mobile No.			Tel. No. STD -		
Email Address					
Above mobile belongs to:	☐ Self	☐ Spouse	☐ Dependent parent(s)	☐ Son	☐ Daughter
Above email belongs to:	☐ Self	☐ Spouse	☐ Dependent parent(s)	☐ Son	☐ Daughter

The existing bank account details registered in the above folios may be Continued*/ Replaced* as per attached fresh Bank Mandate Form.

** Please tick (✓) whichever is applicable.*

Name & Signature of the surviving Unit holder/s

Name	PAN	Signature