

REQUEST FOR TRANSMISSION OF UNITS
(Deletion of name/s of Joint Holders in case of death of the 2nd or 3rd Holder)

To: _____ Date: _____
The Trustees,
_____ Mutual Fund

Sirs,

Request for deletion of name(s) of the 2nd/ 3rd Holder

Sr.#	Scheme Name	Folio No	No. of Units
1			
2			
3			
4			

I/We, the surviving Unit holder/s in the above schemes/folios regret to inform you the demise of the following joint holder(s) on the dates mentioned below –

Name(s) of the Deceased Unitholder(s)	PAN	Date of demise*
Mr./Ms.		DD / MM / YYYY
Mr./Ms.		DD / MM / YYYY

A certified copy of his/her/their Death Certificate/s is/are attached herewith.

I/ we, therefore, request you to delete the name/s of the aforesaid deceased unitholder/s in your records and transmit the Units in the abovementioned folios in my/our name/s.

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

Mobile No.+91		Tel. No. STD
Email Address		

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

The exiting Nomination in the above folios may be Continued*/ Replaced* as per attached Nomination Form.

Name & Signature of the surviving Unit holder/s

Name	PAN	Signature
1.		
2.		

* Please tick (✓) whichever is applicable.

Attachments:

- Copy of Death Certificate of the deceased unitholder
- Fresh Bank Mandate Form along with Cancelled cheque of the new bank account
- Fresh Nomination Form (*Only where change in nomination is desired by the surviving unit holder/s*)
- KYC of the surviving unit holder(s), *if not already complied earlier.*