

CHANGE OF NAME REQUEST FORM (For Individuals/NRIs/Minor)

1. Folio Nos.

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2. Reason for Change: (Refer instructions for mandatory documents to be submitted)

<input type="checkbox"/> Change in First Name	<input type="checkbox"/> Correction / Addition / Deletion of Middle Name	<input type="checkbox"/> Change in Name due to Marriage
<input type="checkbox"/> Change in Name due to Divorce	<input type="checkbox"/> Change in Name of Minor	<input type="checkbox"/> Change in Name Due to Adoption

3. Old Names and New Names:

a. Sole/First Unit Holder:

Old Name:	
New Name:	

b. Second Unit Holder:

Old Name:	
New Name:	

c. Third Unit Holder

[illegible]

4. Change of Tax Status : (Refer Instructions)

☐ Resident Indian (Individual) to NRI – Non-Repatriable ☐ NRI – Non-Repatriable to Resident Indian (Individual)
☐ NRI – Repatriable to Resident Indian (Individual) ☐ NRI – Repatriable to NRI – Non-Repatriable

5. New Bank Details: (Refer instructions for mandatory documents to be submitted)

Bank Account No.:																															
Bank Account Type: (Please tick)	<input type="checkbox"/> Savings	<input type="checkbox"/> Current	<input type="checkbox"/> NRE	<input type="checkbox"/> NRO	<input type="checkbox"/> Other _____																										
Name of Bank:																															
Branch Name:																															
City:																										Pin:					
MICR Code (9-Digit):										(This is 9-digit number next to the cheque number)																					
IFS Code (11-Digit):																															

6. Declaration and Signatures:

I request Canara Robeco Mutual Fund to update the above details in my Folio/s and other relevant records. I hereby declare that the proposed changes will become effective only upon updation of changes in the system and a confirmation to that effect is received by me. I do acknowledge that upon updation, no transaction will be accepted under the old name or signature. In consideration of Canara Robeco Mutual Fund acceding to my request for change of name along with incidental changes, I undertake to indemnify Canara Robeco Mutual Fund against any loss or damages incurred or suffered on account of the above stated information being false or incorrect.

⊗ (First Unit Holder / Guardian)

⊗ (Second Unit Holder / Guardian)

⊗ (Third Unit Holder / Guardian)

7. Signature Verification from Banker:

(Signature of the Branch Manager / Authorized Official with their Seal and Bank Stamp)

Name:

Employee Code:

Designation:

Phone No.:

Change Of Name Request Form - Acknowledgement

Change of Name Request Form received from.....
for Folios.....
(subject to verification of documents)

Signature, Date & Stamp of Receiving Branch of
Canara Robeco Mutual Fund

Mandatory documents to be enclosed:

Change in Name (for reasons other than marriage/re-marriage/divorce /adoption)

- 1) Self-attested copy of PAN card evidencing the new name
- 2) KYC confirmation or acknowledgement copy in the new name
- 3) Gazette Notification towards name change duly Notarized
- 4) If there is a change in the Signature, new signature duly attested by bank manager / authorized official with the Bank Seal / Stamp clearly indicating the name, designation / employee code and Signature of the attesting official

Change in Name due to Marriage

- 1) Self-attested copy of PAN card evidencing the changed name
- 2) KYC confirmation or acknowledgement copy carrying the changed name
- 3) Marriage certificate duly verified and attested by CANARA ROBECO Mutual Fund Branch / Notarised or Certified copy of the State Gazette
- 4) If there is a change in the Signature, new signature duly attested by bank manager / authorized official with the Bank Seal / Stamp clearly indicating the name, designation / employee code and Signature of the attesting official

Change in Name due to Divorce

- 1) Self-attested copy of PAN card evidencing the changed name
- 2) KYC confirmation or acknowledgement copy carrying the changed name
- 3) Certified/notarized copy of the Court order or of the State Gazette
- 4) If there is a change in the Signature, new signature duly attested by bank manager / authorized official with the Bank Seal / Stamp clearly indicating the name, designation / employee code and Signature of the attesting official

Change in Name Due to Adoption

- 1) Self-attested copy of PAN card evidencing the changed name
- 2) KYC confirmation or acknowledgement copy carrying the changed name
- 3) Certified/notarized copy of the Court order evidencing adoption
- 4) If there is a change in the Signature, new signature duly attested by bank manager / authorized official with the Bank Seal / Stamp clearly indicating the name, designation / employee code and Signature of the attesting official

Change in Name of Minor Investor

- 1) Form to be duly signed by Guardian
- 2) For proof of new name - Birth Certificate of the minor duly attested*

Correction / Addition / Deletion of Middle Name*

- 1) Self-attested copy of PAN card
- 2) KYC acknowledgement copy
- 3) Registered Bank account proof where new name as per KYC Is already showing updated

*The changes under this option can be done only in conjunction with the name of the investor as per PAN card. If the name available in PAN and name sought to be changed are different, the investor shall provide an Affidavit towards Middle Name Correction/ Deletion/ Addition on a Non – Judicial stamp paper of Rs.100/- duly attested by a Notary Public.

Applicable / Permissible Change of Tax Status

Existing		New	
Tax Status	Account type	New Tax Status	New account type
Resident Indian (Individual)	SB/CA	NRI - Non-Repatriable	NRO
NRI - Non-Repatriable	NRO	Resident Indian (Individual)	SB/CA
NRI - Repatriable	NRE	Resident Indian (Individual)	SB/CA
NRI - Repatriable	NRE	NRI - Non-Repatriable	NRO

Bank Proof (please submit any one of the following document/s)

- 1) "CANCELLED" original cheque leaf of the New as well as the Existing registered bank account in the Folio/s (where the first unitholder / investor's name is printed on the face of the cheque).
- 2) Copy of the Bank Passbook / Bank Statement (with entries not older than 3 months) of the new bank account as well as the existing bank account wherein the first unitholder / investor's name, bank a/c no. and bank branch is clearly legible.
- 3) A letter from the bank on its letterhead certifying investors' bank account information (new and existing bank mandate) viz. account holders' name, bank a/c no., bank branch, a/c type, MICR and IFS code. In case the existing bank account is already closed, investors may submit letter from such bank on its letterhead, confirming the closure of the account with relevant account details.
- 4) In case investors are unable to submit proof of existing bank account (in line with points 1, 2, 3) above) they may submit a self-attested copy of PAN (where PAN is registered in the folio) in lieu of existing bank account proof.
- 5) In case PAN is not available in the folio and the investor does not have the existing bank proof, investor need to submit the self-attested PAN copy where the PAN is KYC verified.
- 6) Please note that change of bank details from Savings Account to NRE Account and from NRO Account to NRE Account is not allowed.
- 7) COOLING PERIOD: Whenever any change of bank mandate request is received simultaneously with, or just prior to submission of a redemption request, mutual funds / RTAs allow a cooling period of ten days as a matter of precaution against unauthorized / fraudulent transactions.

*(Copies of above documents can be submitted along with the original documents at any of the branches of CANARA ROBECO Mutual Fund and the original document/s will be returned to investors after due verification and attestation. In case the original of any document is not produced for verification, then the copy can be attested by an authorized official of the bank (Officer grade and above) clearly mentioning the name, designation and employee number with bank branch seal).

Need assistance? We are here to help you !



Call us on
1800-209-2726
(Mon to Sat – 09:00AM to 06:00PM)



Email us at
crm@canararobeco.com



Visit our website
www.canararobeco.com