



multi asset, multi manager

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quant mutual

NAME CHANGE REQUEST FORM

To be filled in capital letters and in blue / black ink only.

Date: _____

To
quant Money Manager Limited

Dear Sir/ Madam,

I/We, as stated hereunder, hereby submit the following request to change/correct the name(s) under the below given folio number and PAN registered as either unitholder(s) or joint holder(s) in your records:

Folio No. _____

Unitholder	Current Name in Folio	Name to be corrected/changed to	PAN
1st/Sole Unitholder			
2nd Unitholder			
3rd Unitholder			
Reason for name change/correction	1st/Sole Holder: _____ 2nd Holder: _____ 3rd Holder: _____		

Contact no. _____ Email id: _____

The documents as mentioned in the list (overleaf) are enclosed herewith.

I/We would request you to carry out the above changes.

Thanking you
Yours Sincerely

Signature of 1st/Sole Unitholder

Signature of 2nd Unitholder

Signature of 3rd Unitholder

P.T.O.



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ACKNOWLEDGEMENT - NAME CHANGE REQUEST FORM

Folio No. _____ / _____

Name of 1st Unitholder _____

SIGN & STAMP

1. **Minor name correction** - Documents to be submitted

- Duly filled and signed form
- Self-attested PAN card copy
- Any Document with new /revised name having registered address e.g. KYC acknowledgement letter with address, Passport copy, Election card copy, Aadhar card copy, Utility bills copy, Driving license copy, Registered bank statement copy (All documents to be attested in original)

2. **Major name correction** - Documents to be submitted

- Duly filled and signed form.
- Original cancelled cheque copy from the investor with his/her name and account number clearly printed on the cheque. The name should match with the name change requested by the Investor.
- In absence of such a Cheque, an attestation from the bank manager on the letter head of the Bank whose mandate has been provided at the time of original investment, confirming the Investors Name, Bank branch, Account number and Signature. Photo ID with Signature i.e. PAN Card (If not already available), MAPIN Card, Passport, etc.
- Indemnity Bond duly signed by all the holders in that folio.
 - For Amount (valuation) less than Rs. 10,000/-
Plain paper (should be notarized or bankers attestation is sufficient)
 - For Amount (valuation) more than Rs.10,000/-
Rs. 500 Stamp Paper (should be notarized)
- If the investor has multiple folios in his name and the mode of holding is 'Either or Survivor', and the investor is not the primary holder in all the folios, then the investor can submit a single indemnity bond for all the folios for correction of name. The same applies to joint holders in the folio. However the investor will have to descriptively mention his folio, his name and the order of holding (1st/2nd/3rd holder)

3. **Actual Name change** - Documents to be submitted

- Duly filled and signed form.
- Notarized copy of Notification in Official Gazette of India
- Attestation from the bank manager of the Bank whose mandate has been provided at time original investment, confirming the Investors Name, Bank branch, Account number and Signature.
- Any official/legal document reflecting the name change viz. Attested Bank statement from the same bank of which bank mandate is on our record Passport.
- For applications made by minor investors- Attestation from School Principal confirming the name change and registered accordingly in the school records.

4. **Name change due to marriage** - Documents to be submitted

- Duly filled and signed form
- Notarized copy of the marriage certificate OR
- Certified true copy of the state Gazette OR the original copy of the state gazette in which a declaration has been made to that effect.

5. **Name change due to divorce** - Documents to be submitted

- Duly filled and signed form
- Notarized copy of the divorce certificate, OR
- Certified true copy of the state Gazette OR the original copy of the state gazette in which a declaration has been made to that effect.

- The form is required to be signed by all the holder(s)
- In case of non submission of any of the documents or if the documents are not found to be in order, the AMC reserves the right to not register the name correction application submitted.