



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)

- ☐ Change in First Name ☐ Change in Middle Name / Surname ☐ Change in Name due to Marriage
- ☐ Change in Name due to Divorce ☐ Change in Name of Minor

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

Old Name: _____

New Name: _____

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) Savings ☐ Current ☐ NRE ☐ NRO ☐ Other _____

Name of Bank: _____

Branch Name:

City:

 Pin:

MICR Code (9-Digit):

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 (This is 9-digit number next to the cheque number.)

IFS Code (11-Digit):

6. Declaration and Signatures:

I/We request SBI Mutual Fund to update new name/s and / or signature/s in the folio/s mentioned above and various records as per details mentioned below. I/We hereby agree that new name/s and / or signature/s will be valid and effective only after the changes are updated in the system and a confirmation is received by me / us. After the new name / signature updation, any request with old names / signatures will not be honoured by the Fund.

(Third Unit Holder)

7. Signature Verification from Banker:

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

Name: _____ Designation: _____

Employee Code: _____ Phone No.: _____



Change Of Name Request Form - Acknowledgement

Sponsor: State Bank of India

Investment manager: SBI Funds Management Pvt. Ltd.
(A Joint Venture between SBI and AMUNDI)

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

Signature, Date & Stamp of
Receiving Branch of SBI Mutual Fund

Mandatory documents to be enclosed:

Change in First Name

- 1) Self-attested copy of PAN card in 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 (refer point 7 of Change of Name Request Form)

Change in Middle Name / Surname

- 1) Self-attested copy of PAN card in the new name
- 2) KYC confirmation or acknowledgement copy in the new name
- 3) Affidavit towards change in middle name / surname on 20 Rupees "Non Judicial Stamp Paper" and attested by notary
- 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 and Signature of the attesting official (refer point 7 of Change of Name Request Form)

Change in name due to Marriage

- 1) Self-attested copy of PAN card in the changed name
- 2) KYC confirmation or acknowledgement copy in the changed name
- 3) Marriage certificate duly verified and attested by SBI Mutual Fund Branch / Notary
- 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 (refer point 7 of Change of Name Request Form)

Change in Name due to Divorce

- 1) Self-attested copy of PAN card in the changed name
- 2) KYC confirmation or acknowledgement copy in the changed name
- 3) Court order 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 (refer point 7 of Change of Name Request Form)

Change in Name of Minor

- 1) Form to be duly signed by Guardian
- 2) Affidavit towards change in name on 20 Rupees "Non Judicial Stamp Paper" and attested by notary
- 3) Proof of new name duly attested* (any one of the following documents)
 - Birth Certificate of the minor
 - School leaving certificate
 - Mark Sheet issued by Higher Secondary Board of the respective states, ICSE, CBSE, etc. mentioning name of natural guardian
 - Passport of the minor
- 4) Relationship proof with the existing guardian duly attested*

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 unit holder / investor's / minor'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 unit holder / investor's / minor'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 of 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 / old bank account, they may submit a self-attested copy of any photo ID proof issued by government in lieu of existing / old bank account proof.

* (Copies of above documents can be submitted along with the original documents with any of the branches of SBI 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 copies can be attested by an authorized official of the bank (Officer grade and above) clearly mentioning the name, designation and employee number with branch seal).

All future communication in connection with this application should be addressed to the Registrars of the scheme or SBI Mutual Fund Corporate Office.

Investment Manager:

SBI Funds Management Pvt. Ltd.,
9th Floor, Crescenzo, C-38 & 39,
G Block, Bandra-Kurla Complex,
Bandra (East), Mumbai - 400 051.
Tel.: 022 - 61793537
Email: customer.delight@sbimf.com
Website: www.sbimf.com

Registrars:

Computer Age Management Services Pvt. Ltd.,
SEBI Registration No.: INR000002813,
Rayala Towers, 158, Anna Salai, Chennai - 600 002.
Tel.: 044 - 28435797
Email: enq_L@camsonline.com
Website: www.camsonline.com