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Request Form for Change in Guardian of Minor Unitholder

To,
Helios Mutual Fund

Dear Sirs,

I/We request you to note the change in the guardian of the below-named minor unitholder in your records for the reason indicated hereinbelow:

Name of the Minor Unitholder	
Folio No.	
Name of the new Guardian	
PAN of the new Guardian	
Contact details	Mobile: +91 Tel. No.: Email ID: Mobile No. pertains to ☐ Self ☐ Spouce ☐ Dependent Siblings ☐ Dependent Parents ☐ A Guardian in case of minor Email ID pertains to ☐ Self ☐ Spouce ☐ Dependent Siblings ☐ Dependent Parents ☐ A Guardian in case of minor
Relationship with the Minor	☐ Father ☐ Mother ☐ Legal Guardian *Please tick [✓] whichever is applicable*

FATCA and CRS information of the new Guardian

Country of Birth _____ Place of Birth_____ Nationality _____

Are you a tax resident of any country other than India? ☐ Yes ☐ No

If Yes, please mention all the countries in which you are resident for tax purposes and the associated Taxpayer Identification Number and its identification type in the column below.

Country	Tax-Payer Identification Number	Identification Type

Reason for request for change in Guardian	☐ With mutual consent with the existing guardian *(who has signed below).* ☐ Consequent on demise of the existing guardian. ☐ Pursuant to appointment of a Legal guardian by a competent court.
Signature of the new Guardian *(as per the bank account of the Minor, where the new guardian is registered as the Guardian)*	**X** **Attestation of signature of new Guardian by existing Guardian** *(if change in the guardian is with mutual consent)*
Name of the existing Guardian *(as registered in the Minor's folio)*	
Signature of the existing Guardian	**X**

Attestation of signature of the new Guardian by the bankers

Bank Account Details (*Mandatory) (Attestation of signature of the new Guardian by the bankers)

Name of Bank A/c Type: (✓) ☐ Savings ☐ Current ☐ NRE ☐ NRO

Account No. **Bank Branch** **Bank City**

Name* of the Authorised Bank Official

Designation*

Employee Code* **Tel. Number***

Signature of bank official with Bank's seal

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Documents Attached

- ☐ Copy of PAN Card of the new Guardian
- ☐ KYC Acknowledgment ☐ OR KYC form of the new Guardian
- ☐ Attested* copy of Death Certifi cate of the Guardian *(if applicable)*
- ☐ Attested* copy of the court order if the change guardian is due to appointment of Legal Guardian by the court.
- ☐ Documentary evidence showing relationship of the new Guardian with the Minor *(such as the minor's Passport/ birth certifi cate/ PAN Card / School Leaving Certifi cate etc. of wherein name of the new guardian is mentioned)*
- ☐ A cancelled cheque evidencing the change of guardian in respect of the minor's registered bank account with the new Guardian's name.

**To be duly attested by a Notary Public or a Judicial Magistrate First Class (JMFC) or a Gazetted Officer.*

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ACKNOWLEDGEMENT SLIP (To be filled in by the Applicant)

Request for Change in Guardian of Minor Unitholder from _____

_____ for

Folio No. (subject to verifi cation of documents).

Signature with Seal

Contact Us at : website: www.heliosmf.in Email: customercare@heliosmf.in Toll Free No.: 1800 2100 168