



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

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.

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(First Unit Holder / Guardian)

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(Second Unit Holder)

(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.: _____

- TEAR HERE



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