

NAME CHANGE REQUEST FORM



Date:

To
The Trustee,
ICICI Prudential Asset Management Company Ltd.

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(s) registered in your records:

Folio No.: _____

1ST /SOLE UNITHOLDER	PAN <input type="text"/>
Current Name in Folio <input type="text"/>	
Name to be corrected/changed to <input type="text"/>	NAME AS PER PAN
Reason for Name Change/Correction : (Please ✓)	<input type="checkbox"/> Minor Name Correction <input type="checkbox"/> Major Name Correction <input type="checkbox"/> Actual Name Correction <input type="checkbox"/> Name change due to Marriage <input type="checkbox"/> Name change due to Divorce <input type="checkbox"/> Others (please, specify _____)

2ND UNITHOLDER	PAN <input type="text"/>
Current Name in Folio <input type="text"/>	
Name to be corrected/changed to <input type="text"/>	NAME AS PER PAN
Reason for Name Change/Correction : (Please ✓)	<input type="checkbox"/> Minor Name Correction <input type="checkbox"/> Major Name Correction <input type="checkbox"/> Actual Name Correction <input type="checkbox"/> Name change due to Marriage <input type="checkbox"/> Name change due to Divorce <input type="checkbox"/> Others (please, specify _____)

3RD UNITHOLDER	PAN <input type="text"/>
Current Name in Folio <input type="text"/>	
Name to be corrected/changed to <input type="text"/>	NAME AS PER PAN
Reason for Name Change/Correction : (Please ✓)	<input type="checkbox"/> Minor Name Correction <input type="checkbox"/> Major Name Correction <input type="checkbox"/> Actual Name Correction <input type="checkbox"/> Name change due to Marriage <input type="checkbox"/> Name change due to Divorce <input type="checkbox"/> Others (please, specify _____)

INVESTOR(S) DECLARATION & SIGNATURE (S)		
I/we hereby declare and confirm that the information provided in this form is true and correct and is duly supported by the document proof enclosed alongwith the form. In case of non submission of any of the documents or if the documents are not found to be in order, the AMC is reserves to right to not register the application submitted. The AMC/Mutual Fund shall not be liable and/or responsible for any loss or damage that I/we may incur if the Form is rejected.		
SIGNATURE OF SOLE / FIRST UNITHOLDER	SIGNATURE OF SECOND UNITHOLDER	SIGNATURE OF THIRD UNITHOLDER
<input type="text"/>	<input type="text"/>	<input type="text"/>



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.
- A self attested PAN card copy with new name and KYC verified with new name
- 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)
 - 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 (Or) Affidavit for name change as per AMC format(100Rs)Duly Notarised and the Copy of advertisement given for name change in 2 newspaper, 1 Regional newspaper and one national, daily newspaper
- A self attested PAN card copy with new name and KYC verified with new name
- 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 - Passport / School Certificate or Birth Certificate (relationship) duly notarized / Official/ Gazette / Magistrate / Bank Manager, AMC.

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.
- A self attested PAN card copy with new name and KYC verified with new name

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

- Duly filled and signed form
- Notarized copy of the divorce certificate, OR
- Family Court Order with Court seal duly notarized
- A self attested PAN card copy with new name and KYC verified with new name

- 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.