kotak® Mutual Fund

Change in Tax Status & Change in Bank Details

FOLIO / UNIT-HOLDER DETAILS

Folio No. : _____

	Sole / First Unit Holder	Joint Holder 1	Joint Holder 2
Name :			
PAN :			

CHANGE IN TAX STATUS

Please Change the Tax Status for Sole/ First Unit-holder as under, for the aforementioned Folio

- ☐ Resident Individual
- ☐ Non-Resident Individual
  - O Non-Repatriable
  - O Repatriable

CHANGE IN BANK ACCOUNT DETAILS (For updation of all investments in the folio)

Please update the Bank Details of for Sole/ First Unit-holder as under, for the aforementioned Folio

Account No. :

Account Type : O Savings O NRO O NRE

Bank : _____

Branch : _____

MICR : 9 digit number next to your cheque number

IFSC Code : 11 digit code appearing on the cheque leaf. If you do not find this on your cheque, please check for the same with your local Bank.

DOCUMENT PROOF (**Mandatory** to submit **any one**)

The document should reflect the Name of the First/Sole Unit holder, Bank Name, Bank Account Number and Bank Account Type

O Cancelled Cheque Leaf O Attested copy of Bank Passbook O Attested copy of Bank statement

UNIT HOLDER CONTACT DETAILS

Kindly furnish your E-Mail address & Contact Numbers, to help us serve you better

Email Id : _____ Mobile No. _____

Res. No. _STD_ _____CONTACT NO.____ Off. No. _STD_ _____CONTACT NO.____ Fax No. _STD_ _____CONTACT NO.____

KINDLY SUBMIT THIS FORM TO YOUR NEAREST KMAMC/ CAMS OFFICE

UNIT HOLDER(S) SIGNATURE(S) & DECLARATION

I/ We hereby declare that particulars given above are correct and express my willingness to receive credit of Dividend / Redemption proceeds through the mode indicated above. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information. I/ We would not hold Kotak Mutual Fund/ Kotak Asset Management Company Limited, its registrars and other service providers responsible. I/ We will also inform Kotak Mutual Fund/ Kotak Asset Management Company Limited, any changes in my/ our above bank account.

SIGNATURE(S)

Signature of Sole/ First Unitholder	Signature of Second Unitholder	Signature of Third Unitholder

(To be signed by All Unitholders if units are held jointly)

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