



REQUEST FOR TRANSMISSION OF UNITS

(Deletion of name/s of Joint Holders in case of death of the 2nd or 3rd Holder)

Date: DD MM YYYY

To:

The Trustees,

Mutual Fund

Request for deletion of name(s) of the 2nd/ 3rd Holder

Sirs,

Table with 4 columns: Sr.#, Scheme Name, Folio No., No. of Units. Rows 1-4.

I/We, the surviving Unit holder/s in the above schemes/folios regret to inform you the demise of the following joint holder(s) on the dates mentioned below -

Table with 3 columns: Name(s) of the Deceased Unitholder(s), PAN, Date of demise*. Rows for Mr./Ms.

A certified copy of his/her/their Death Certificate/s is/are attached herewith.

I/ we, therefore, request you to delete the name/s of the aforesaid deceased unitholder/s in your records and transmit the Units in the abovementioned folios in my/our name/s.

I also request you to update my email and mobile no. in your records as follows:

Mobile No. and Tel. No. STD input fields

Relationship checkboxes: Self, Spouse, Son, Daughter, Parent, Sibling, Guardian of Minor

Email ID input field

Second set of relationship checkboxes

The existing bank account details registered in the above folios may be Continued*/ Replaced* as per attached fresh Bank Mandate Form.

Nomination (Please tick one of the options below)

Nomination options: I DO NOT wish to make a nomination. I wish to make a nomination and hereby nominate the person/s...

Acknowledgement Slip (To be filled in by the Investor)

Application No. input field

Collection Centre / ABSLAMC Stamp & Signature

Received from Mr. / Ms. Date :

Name & Signature of the surviving Unit holder/s

Name	PAN	Signature
1		
2		

* Please tick (✓) whichever is applicable.

Attachments:

- Copy of Death Certificate of the deceased unitholder
- Fresh Bank Mandate Form along with
- Cancelled cheque of the new bank account
- Fresh Nomination Form (Only where change in nomination is desired by the surviving unit holder/s)
- KYC of the surviving unit holder(s), **if not already complied earlier.**