

To be filled in Capital Letters.

Date : \_\_/\_\_/\_\_\_\_

Please read the section on Instructions – Terms and Conditions, prior to filling in the form

### Change in Account Information

(Please ✓ the applicable request)

Folio/Account Number	Name of the Unitholders	
	Sole/First Applicant	
	Joint Holder Name 1	
	Joint Holder Name 2	
	Name of Guardian (in case of Minor)	

#### Change/Updation of Address

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..... City : ..... Pin Code..... State: .....

#### Change/Updation of Contact Details of Sole / First Applicant

E-mail address						
Mobile No.		STD Code		Residence Tel. No.		Office Tel. No.

#### Updation/Correction of PAN and Know Your Client (KYC)

Holder	PAN Proof Enclosed <input type="checkbox"/>	KYC Ack. Enclosed <input type="checkbox"/>
Sole/1 <sup>st</sup> Unit Holder		
Joint Holder 1		
Joint Holder 2		
Guardian in case of Minor		

#### Change/Updation of Bank Details

Bank Account Number #			
Bank Account Type (Please ✓)	<input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> FCNR <input type="checkbox"/> Others (Please specify) .....		
Bank Name			
Bank Branch Address	..... City : ..... Pin Code : .....		
RTGS/IFSC/NEFT Code	11 digit code is printed on the cheque book	MICR Code	9 Digit Number next to the Cheque No.

#### Change of Mode of Holding

 Joint  
  Either / Anyone or Survivor

#### Change of Status

 Resident Indian to Non Resident Indian  
  Non Resident Indian to Resident Indian

#### Change/Correction of Name

<input type="checkbox"/> Sole/First Applicant	<input type="checkbox"/> Joint Holder Name 1	<input type="checkbox"/> Joint Holder Name 2	<input type="checkbox"/> Name of Guardian (in case of Minor)	<input type="checkbox"/> Nominee Name	<input type="checkbox"/> Assignee Name
Change/Correct Name as .....					

#### Registration of Power of Attorney

POA Holder Name		PAN	
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Please enclose the relevant documentary proof duly attested as listed in the instructions. The request is liable to be rejected if any information is missing or incorrectly filled or if there is deficiency in the documents submitted.

Signature of  
Sole/1<sup>st</sup> Applicant/POA  
Holder/Authorized Signatory

Signature of  
Joint holder 1 /POA Holder

Signature of  
Joint Holder 2/ POA Holder

Signature of  
Guardian in case of Minor

(To be signed by all applicants/unitholders if mode of holding is 'joint')

## Instructions - Terms and Conditions

1. Kindly submit individual 'Change in Account Information' forms for each folio.
2. In case unit holder's PAN is KYC Compliant, kindly submit the request for **change/correction in address** to any of the Points of Service(s) appointed by KYC Registration Agency (KRA). After updation of the address, KRA will communicate the same to the R&T Agent and the database of AMC will be suitably updated to reflect new/corrected address.
3. Where **change in bank mandate** is received along with the redemption request and any one of the supporting documents is missing, the redemption payment will be released with old/existing bank account.
4. Whenever any change of bank mandate request is received / processed few days prior to submission of a redemption request or on the same day along with redemption request, there is cooling period of 10 calendar days for validation and registration of bank accounts. The process of validation will include notifying the investor through letter, e-mail, SMS about the registration of a new bank account (as per AMFI circular number 135/BP/17/10-11 dated October 22, 2010). The redemption payment will be released post completion of the cooling period (10 calendar days) but within 10 working days (statutory timeline) from the processing of redemption to the new bank details provided by investor.
5. **All supporting documents should be attested by the bank branch manager, along with the bank stamp, Signatory full name, designation & Employee Code. List of supporting documentary proof for respective Changes in Account Information as follows :**

### Change/Updation of Address

1. **Proof of New Address (POA) : (any one)**
  - Utility bills like Telephone Bill (only land line), Electricity bill or Gas bill -Not more than 3 months old.
  - Bank Account Statement/Passbook -Not more than 3 months old.
  - Self-declaration by High Court and Supreme Court judges, giving the new address in respect of their own accounts.
  - **Proof of address issued by any of the following:** Bank Managers of Scheduled Commercial Banks/Scheduled Co-operative Bank/ Multinational Foreign Banks/Gazetted Officer/Notary public/ Elected representatives to the Legislative Assembly or Parliament/ Documents issued by any Govt. or Statutory Authority.
  - **Identity card/document with address, issued by any of the following:** Central/State Government and its Departments, Statutory/Regulatory Authorities, Public Sector Undertakings, Scheduled Commercial Banks, Public Financial Institutions, Colleges affiliated to Universities and Professional Bodies such as ICAI, ICWAI, ICSI, Bar Council etc.to their Members.
2. **Proof of Identity (POI):** Self-attested Copy of PAN Card

### Change/Updation of Bank Details

1. **Proof of Bank : (any one)**
  - Cancelled original cheque of the new bank mandate with first unit holder name and bank account number printed on the face of the cheque.
  - Self attested copy of bank statement with the account number, IFSC Code name of the Unit holder and Address with Banker's attestation with bank stamp, Signatories full name , designation, signature & Emp. Code.
  - Bank passbook with current entries not older than 3 months with the account number, IFSC Code name of the Unit holder and Address.
  - Bank Letter duly signed by branch manager/authorized personnel on its letter head certifying the Account is present in the given account holder's name, account number and branch address. Letter / certificate should with bank stamp, Signatories full name, designation, signature & Emp. Code.
2. **Proof of Identity (POI):** Self-attested Copy of PAN Card

### Updation/Correction of PAN and Know Your Investor (KYC)

- Self-attested Copy of PAN Card
- In case of KYC Compliant, KYC acknowledgment issued by KYC Registration Agency (KRA).

### Change of Status

- Proof of Bank : (any one)**
- Banker letter (which should not be more than three (3) months old from the date of the request) confirming the account details and change in investor status
  - Cheque copy of the existing bank of the unit holder, reflecting the change in his status from resident to Non-resident.

### Change in Mode of Holding

- All the unit holders need to be signed on the Change in Account Information Form in order to have consent of both the holders.

### Correction of Name

- Letter from the bank from which subscription was made.
- Self-attested copy of PAN Card

### Registration of Power of Attorney

- Copy of Power of Attorney on Rs. 100/- stamp paper, duly signed by all the unit holder(s) and the Power of Attorney Holder, and Original attestation by Notary public \ Gazetted officer.
- In case of the POA holder being a company, the POA holder to provide the list of its Authorized signatories, with their signatures duly attested by the POA holder company.
- Copy of PAN Card and KYC Acknowledgement of POA holder.
- Copy of PAN Card and KYC Acknowledgement of unit holder in case not updated in PMF Account/Folio No.

### Change/Correction in Name

1. In case of Change in Name,
  - Copy of Government Gazette duly attested by Gazetted Officer or Notary **OR**
  - Copy of Marriage Certificate duly attested by Gazetted Officer or Notary.
  - Self-attested copy of PAN Card and KYC reflecting New Name
2. Change of Company Name,
  - Copy of Registrar of Company's certificate for change in name duly attested by Company Secretary or Authorized Signatories.
  - Copy of MOA, AOA (carrying new name of the company), Board Resolution authorising the name change and revised Authorised Signatory list. All the documents should be duly attested by Company Secretary or Authorized Signatories.
  - Self-attested copy of PAN Card and KYC reflecting New Name

6. Please note that, the above mentioned documents are standardized in addition to the same, additional documents can be required on case to case basis.
7. If Change in Signature is also to be admitted, kindly submit a "Confirmation of Bank Details with Signature Attestation" duly filled, signed and attested by the bank branch manager/authorized signatories of the Bank, with the bank stamp, Signatory full name, designation & Employee Code along with "Change in Account Information Form".
8. On receipt of the aforementioned documents and post following standard verification procedure, the same will be processed.
9. Investor may submit the duly completed "Change in Account Information Form" along with relevant documentary proof as mentioned above at any of our nearest Investor Service Centres. The list of Point of Official Point of Acceptance / Investor Service Centres are available on our website – <http://www.principalindia.com/contact-us>.
10. Confirmation/Rejection of the request will be forwarded to unit holder at his registered address as well as via emails (if registered) and SMS (if mobile number registered).