

CHANGE OF NAME / SIGNATURE

(for Individuals only)



WHITEOAK
CAPITAL MUTUAL FUND

Folio Number

APPLICANTS DETAILS

(please mention your old name here in case of Change of Name Request)

Sole / 1st Holder Details

Name PAN

2nd Holder Details

Name PAN

3rd Holder Details

Name PAN

BANK ACCOUNT DETAILS FOR VERIFICATION (Bank details registered in folio)

Bank Account No. Account Type ☐ Current ☐ Savings ☐ NRO ☐ NRE ☐ Others ☐ Please Specify

Bank Name Branch Name

Bank Address

City Pin

IFSC Code (11 digit)* MICR Code (9 digit)* *Mentioned on your cheque leaf

OLD & NEW NAMES OF THE UNIT HOLDER / NEW SPECIMEN SIGNATURE

I/We request WhiteOak Capital Mutual Fund to update new name/s and/or signature/s and various records in the folio/s as per the details mentioned above and below.
I/We hereby agree that new name/s and/or signature/s will be valid and effective only after the changes are updated and a confirmation is received by me/us. After the new name /signature audition, any requests with old name/signature will not be honored by the fund.

(Please fill applicable fields only)	Sole / 1st Unit Holder	2nd Unit Holder	3rd Unit Holder
Old Name/s (as per existing records)			
New Name/s (don't fill this section, in case of change of signature only)			
Old Signature/s (as per existing records)			
New Signature/s (don't fill section, in case of change of name only)			

ACKNOWLEDGEMENT

Received, subject to verification request to

☐ Change of Name ☐ Change of Signature

From

Folio No.



WHITEOAK
CAPITAL MUTUAL FUND

ISC Stamp & Signature

INSTRUCTIONS

1. Separate forms needs to be filled for separate folios of the investor.
2. This form is only for Change of Name/ Signature. For changing any other details like change of contact details, address, bank account details, etc. Please fill separate forms as available on the website i.e. mf.whiteoakamc.com
3. Following documents need to be submitted for the change of signature
 - Duly signed request letter from Investor.
 - Self-attested Govt. issued Photo ID proof - e.g.: PAN Card, Passport etc., where the signature tallies with the new signature of the investor.
 - Signature attestation letter from Bank where the investor holds the account and details of which are provided in bank account details for verification.
4. Following documents need to be submitted for the change of name:

Reason for Name / Signature Change	Documents required
General	<ul style="list-style-type: none"> • Duly signed request by the investor • 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. OR Affidavit on a 100 non judicial stamp paper duly notarized in original • New signature (if any, post change in name) certified by the banker • Copy of the PAN card and Verified KYC in new name
Name corrections	<ul style="list-style-type: none"> • Duly signed request by the investor • Copy of the PAN card, Verified KYC along with any of the following: • Ration card / Election Card / Passport / Aadhar Card / School transfer certificate / standard 10th or 12th certificate
Post Marriage	<ul style="list-style-type: none"> • Duly signed request by the investor (Request should be accompanied with both the maiden name signature and new signature – in case of change in signature post marriage) • Certified copy of Marriage certificate duly attested • New signature (post change in name – if applicable) attested by the banker with complete details (stamp, designation, employee code) • Complete bank details (if any) along with personalized cancelled cheque leaf • Copy of the PAN card and Verified KYC in new name
Divorce	<ul style="list-style-type: none"> • Duly signed request by the investor (Request should be accompanied with both old and new signature – in case of change in signature post-divorce) • Certified copy of Divorce decree duly notarized • New signature (post change in name – if applicable) attested by the banker with complete details (stamp, designation, employee code) • Complete bank details (if any) along with personalized cancelled cheque leaf having printed name • Copy of the PAN card and verified KYC in new name <p>Please note that divorce decree will suffice only if the last name is changing as a result of divorce.</p> <p>If both, first and last name, are changing as a result of divorce, investor needs to submit one of the following:</p> <ul style="list-style-type: none"> • Certified true copy of the state Gazette • Marriage Certificate that reflects both maiden name and post marriage name

5. The above documents shall be in Original. If copies are furnished, the same must be submitted at the ISCs where they will be verified with the original documents to the satisfaction of the Fund. The original documents will be returned across the counter to the Unit Holder after due verification. In case the original of any document is not provided for verification, then the copies should be attested by the bank manager with his/her full signature, name employee code, bank seal and contact number.
6. In the event of a request for change in Name/ Signature being invalid/incomplete/ not satisfactory in respect of signature mismatch/document insufficient/ not meeting any requirement, the request will be liable for rejection.