

Request for Change in Mutual Fund Distributor Code (MFD) ARN / Registered Investment Advisor (RIA) Code



To,
WhiteOak Capital Mutual Fund

I, we hereby give my/our consent to update/change the Mutual Fund Distributor Code(MFD) /RIA code in respect of my/our investments in following folio number/s and schemes of WhiteOak Capital Mutual fund mentioned below:

Broker code change to be made (Please Tick ✓) ☐ Folio Level ☐ Scheme Level

Folio No	Scheme Name / Plan / Option / Sub Option
	WhiteOak Capital
	WhiteOak Capital
	WhiteOak Capital
	WhiteOak Capital
	WhiteOak Capital

Old MFD ARN / RIA Details		New MFD ARN / RIA Details		New Sub - MFD ARN		NEW Employee Unique Identification No. (EUIN)	
MFD ARN / RIA Code	MFD ARN / RIA Name	MFD ARN / RIA Code	MFD ARN / RIA Name	Sub - MFD ARN	Sub - MFD ARN Name	EUIN	

Declaration: I /We wish to change the MFD ARN code/RIA code and request WhiteOak Capital Mutual Fund to update the MFD ARN code/RIA code in my/our folio number/s mentioned above. I /We understand that if any mandatory details are not mentioned the request will be liable to be rejected. I/We hereby give my/our consent to share the transaction data feeds in respect of my/our investments to the above mentioned MFD/RIA.

DECLARATION & SIGNATURES (To be signed as per the Existing Mode of Holding)

Investor Details	1st holder	2nd Holder	3rd Holder
Name			
Signature			

Date

D	D	M	M	Y	Y	Y	Y
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 Place

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INSTRUCTIONS

- All fields are mandatory.
- ARN to RIA / ARN to Direct or vice-versa is not applicable
- In case of corrections / overwriting on key fields (as may be determined at the sole discretion of the AMC), the AMC reserves the right to reject the request, in case the investor(s) has/have not countersigned in every place where such corrections/overwriting has/have been made.
- Wherever no schemes are specified, the MFD code/ RIA code change/update will be processed for all schemes in the given folio.



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[Acknowledgement copy (To be filled by investor)]

Folio number

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Date

D	D	M	M	Y	Y	Y	Y
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Received from Mr./Ms./Mrs.

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Stamp & Signature