

**New Bank Mandate details with attestation from Bank Branch Manager**

<To be given on Bank's Letter Head> or with <Bank Branch seal, employee name and number seal>

**TO WHOMSOEVER IT MAY CONCERN**

This is to certify that

Mr. / Mrs.<sup>(#)</sup> : \_\_\_\_\_  
S/o or D/o : \_\_\_\_\_  
residing at : \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

is holding the following account in our bank and branch:

Bank Name : \_\_\_\_\_

Branch Name : \_\_\_\_\_

Bank A/c No. : 

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

A/c Type (Pls ): Savings Current NRE NRO FCNR Others \_\_\_\_\_

MICR Code (9 Digit) : 

|  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|

IFSC Code (11 Digit) : 

|  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|

MICR Code: \_\_\_\_\_

IFSC Code: \_\_\_\_\_

Signature of the above A/c holder as per Bank's records 

|  |
|--|
|  |
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Signature of Bank Manager 

|  |
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Bank & Branch Seal With employee name and number 

|  |
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Date: \_\_\_\_\_

Place: \_\_\_\_\_

(#) = Name of the Nominee / Claimant

(To be given by the Nominee/s)

**INDEMNITY BOND WITH RESPECT TO TRANSFER OF THE MUTUAL FUND UNITS HELD BY THE DECEASED HOLDER WITH PRODUCTION OF LEGAL REPRESENTATION.**

**(In case of Transmission of Mutual Fund Units held by a Single Holder/ on death of all unit holders in case of Joint Holding and where there is nominee registration)**

I/We do hereby solemnly affirm and sincerely state on oath as follows,

I/We inform you that "Mr. / Ms. <sup>(+)</sup> \_\_\_\_\_" passed away on \_\_\_\_\_ and he/she was holding the following Mutual Fund Units:

| S. No. | Name of Mutual Fund | Scheme Name | Folio No | No. of Units Held |
|--------|---------------------|-------------|----------|-------------------|
|        |                     |             |          |                   |
|        |                     |             |          |                   |

I /We further inform you that he/she has nominated me/us as the nominee of the mutual fund units standing in his/ her name.

I/We have, therefore, approached you with a request to transfer the aforesaid Mutual fund units in the name of the undersigns

"Mr. \_\_\_\_\_ / \_\_\_\_\_ Ms. \_\_\_\_\_ <sup>(#)</sup>"

without insisting of production of a succession certificate or an order of the court of competent jurisdiction for which I /We execute an indemnity as is herein contained and on relying on the information herein given by us believing the same to be true.

In consideration therefore of my / our request to transfer above said Mutual Fund units to my/our name/s, I/We agree to receive the said units only as an agent and trustee for the legal heirs or legatees of the said unit holder/s. I/We hereby further agree and undertake to indemnify and keep indemnified, saved, defended, harmless you and your successors and assigns for all time hereafter against all losses, costs, claims, actions, demands, risks, charges, expenses, damages, etc., whatsoever which you may suffer and/or incur by reason of your, at my request, transferring the said mutual fund units as herein above mentioned, to my / our name/s without insisting on production of a succession certificate or an order of the court of competent jurisdiction.

IN WITNESS WHEREOF THE said "Mr. / Ms. <sup>(#)</sup> \_\_\_\_\_" have here unto set their respective hands and seals this \_\_\_\_\_ day of \_\_\_\_\_.

Signed and delivered by the said applicant/s

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Name & Address of Nominee(s)

Signature of the Nominee(s)

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

Place: \_\_\_\_\_

\_\_\_\_\_  
Signature of the Notary with Name & Seal

<sup>(+)</sup> = Name of the deceased unit holder

<sup>(#)</sup> = Name of the claimant