

Form for Surrendering Unit Certificate

Date: _____

Folio No. _____

Submit one form for each folio you hold

Investment/s was / were made in the above folio. In terms of offer document of the scheme, you had called us to surrender the unit certificate and in lieu collect statement of account (SOA)

I am now surrendering the unit certificates as tabled below:

Name on Unit Certificate _____

Sr.	Certificate No	Distinctive from	Distinctive To	Number of Unit
1				
2				
3				
4				
5				
	TOTAL			

* If the above table is not sufficient, please use extra sheet and attach

I/we also confirm to the following

Sr.	Subject	Status (Y / N)	Remark
1	Know Your Customer (KYC)		If 'Y' please attach KYC acknowledgement If 'N' please fill up KYC application and complete the process
2	PAN Card		Attach Copy
3	Nomination		If 'Y' or 'N' – Please fill Nomination form
4	Bank Account		Please use Bank Account registration form
4	Mobile Number / Email ID		Please use Contact details update form
5	Signature		Please provide bank attestation of signature

Signature of Single / First Holder	Guardian's Attestation	Bank Attestation
Name	Registered Guardian's Name	Branch Seal with attester's Employee Name & Employee Number

Documents to be attached:

KYC Confirmation Letter / KYC acknowledgment copy additionally with PAN Card copy. [Mandatory]. Age Proof – Birth Certificate / PAN Card Copy / Driving License/AADHAR Card

Attach Any **one** of following:

Cancelled Cheque with Name & Account number printed on it.

Original Bank statement / Copy of the Bank Statement showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager

Copy of Pass book showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager

All the above documents to be attested

Please note (You may produce the originals of the documents mentioned above, along with the photocopies, at the counter, we shall verify them and return the originals to you, or photocopies can be submitted attested by the Banker Manager, (name , designation, employee code and seal should be affixed , clearly on the copy).