

Investment Services Account – Change of Bank Account Linkage Details

Date: _____

Investment Services Account No.: _____

Old Default Bank Account No: _____

New Default Bank Account No: _____

New Account Type : ☐ Resident ☐ Current ☐ Savings

☐ NRE ☐ NRO

Bank A/C Holding Pattern: ☐ Savings ☐ Either or Survivor

List of Folios:- Please refer Annexure 1

Name of Existing Bank Account Holders

Signature of Existing Bank Account Holders

1st Holder _____

2nd Holder _____

3rd Holder _____

Name of Proposed Bank Account Holders

Signature of Proposed Bank Account Holders

1st Holder _____

2nd Holder _____

3rd Holder _____

Signature of Investment Services Account Holders

Name of Investment Services Account Holders

RM Sign _____ RM Name _____ RM Employee Code _____

BM Sign _____ BM Name _____ BM Employee Code _____

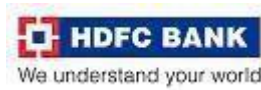
Annexure 1

List of Folios

Sr.No	AMC Name	Folio Number
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

First holder Second holder Third holder
Signature of Investment Services Account Holders

First holder Second holder Third holder
Name of Investment Services Account Holders



Documentation

- 1. Cancelled Chq of the existing (Old) and the proposed (New) bank account. The Name of the customer should be printed on the same Or**
- 2. Bank A/c statement with the Branch manager attestation**
- 3. Self-attested PAN Card copy**

Note-

Customer id linked to both the bank accounts should be the same.

Tax status of both the bank accounts should be the same.

The holding pattern should be the same.