

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

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 _____



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.