Classified as Internal

FORM-1: Request for Deletion of name(s) of Joint Holders in case of death of the 1st and/or 2nd Joint Holder(s)

To:
<Fund Name>/RTA Name>
<Address>
<City> - <Pincode

Date: mmm, dd, yyyy

Part A – Claimant and Deceased Holder information

Folio No(s).	
Deceased Holder Name:	
Claimant Name	
Claimant PAN / PEKRN (Mention only number)	

Dear Sir/Madam,

I/We, the surviving unit holder(s) in the above referred folio(s), hereby inform you about the demise of the following unit holder(s) on the dates mentioned

Name of the deceased unit (joint) holder(s)	PAN	Date of demise
Mr./Ms.		
Mr./Ms.		

I/We request to delete the name of 1st or 2nd Joint Holder in the following folio(s) held by me

S. No.	Folio No.	Scheme Name	Units Held

I/We also request you to update my email and mobile no. in your records as follows

Mobile No. | | | | | | | | | |	Tel. No. STD -
Email Address	
Above mobile belongs to: ☐Self ☐Spouse ☐ Dependent parent(s) ☐ Son ☐ Daughter	
Above email belongs to: ☐Self ☐Spouse ☐ Dependent parent(s) ☐ Son ☐ Daughter	

The existing bank account details registered in the above folios may be ☐ **Continued*** / ☐ **Replaced*** as per attached fresh Bank Mandate Form.
Please submit the updated Nomination form, if the Folio becomes single holding post the above deletion.
** Please tick (✓) whichever is applicable.*

Name & Signature of the surviving Unit holder/s

Name	PAN	Signature

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Documents checklist to be attached along with the transmission request form.

S. No.	Document	Submitted	Remarks
1	Original Transmission Request Form (duly filled and signed).	☐	
2	Verifiable death certificate (as per SEBI circular dated July 23, 2026) of the deceased holder.	☐	
3	Copy of the Statement of account (SOA) if available or Original security certificate, where applicable.	☐	
4	Nomination Form or Nomination Opt-Out form (if not already registered or Folio becomes Single Holding post this deletion)	☐	
5	FATCA-CRS Declaration in a prescribed format (if not already provided or latest updates)	☐	
6	Any other document as requested specifically including cancelled cheque copy wherever applicable.	☐	