Request for Change/Addition of Bank Mandate

HSBC Global Asset Management

Folio No(s).	1. 2. 3. 4.
PAN/PEKRN	
Investor's Name	

☐ Change of Bank Mandate ☐ Addition of Bank Mandate *(For Adding more than one Bank – Multiple Bank* Mandate *form to be used)*

To,

HSBC Mutual Fund

This has the reference to my/our investments in the captioned folio(s) in your Fund.

I/We would like to Change/addition of my/our Bank Mandate registered in the referred Folio(s) as per the details provided below:

1. Old / Existing Bank Account details:

Bank Account No.	
Bank A/c. Type	☐ Savings ☐ Current ☐ NRI-NRO ☐ NRI-NRE ☐ Others
Bank Name	

*** in case of non-availability of old bank proof (as mentioned in mandatory documents), In-Person verification (IPV) is mandatory*

2. New Bank Account details: *(The new bank account mentioned in this form will be registered as the default account.)*

Bank Account No.	
Bank A/c. Type	☐ Savings ☐ Current ☐ NRI-NRO ☐ NRI-NRE ☐ Others
Bank Name	
Bank Branch Name	City :
IFSC Code	

3. Change In Tax Status:

In-case of Change in Tax Status, please tick the applicable new tax status:

☐ Resident Individual ☐ NRI on Repatriation Basis ☐ NRI on Non-Repatriation Basis

4. My identity details for IPV *(copy enclosed & original shown for verification)**

Description	**First Holder / Guardian**	**Joint Holder1**	**Joint Holder2**
PAN** / *(Please Specify)* #			
Holder's Name			
Contact Number			
Signature $	×	×	×

DECLARATION :

I/We have read and understood the Instructions and the Terms and Conditions for New Bank Mandate and agree to abide by the same.

I/We acknowledge that my/our request will be processed only if all details are properly filled and valid documents are attached, failing which the request maybe rejected/delayed as the case may be in which case I/We will not hold HSBC Mutual Fund, the AMC and the Registrar liable for any loss due to delayed execution or rejection of the request.

** First unit holder OR Any 1 of the unit holder where mode of holding in the folio is anyone or survivor*

 # Self Attested Photo Identity Proof for PAN Exempt Investors like Passport, Voter ID, Ration Card, Driving License, Aadhaar (Number to be scored out)

$ To be signed by all the holder(s) as per the mode of holding. In case of Non-Individual Unit holders, to be signed by AUTHORISED SIGNATORIES

5. In-Person verification (For Office Use only) – *applicable only if the old / existing bank mandate proof not submitted*

I have done the In-Person verification of the above referred investor along with ID document specified above; matched with the information available in the referred Folio(s) and found them in order. Also verified the originals of new bank mandate documentary proof with the copies shared and found them in order.

Employee Name		×
Employee No.		
Location Name	CAMS/AMC - <Location Name>	
Date	D D M M Y Y Y Y	Signature with Branch Seal

6. Mandatory Documents Required *(Please attach any one of the following)***

For the existing / new bank account

- Cancelled original cheque leaf, where the account number and first Unit holder name is printed on the face of the cheque (OR)
- Bank Passbook having the name, address and account number of the account holder

Note: The above documents should be either in original or copy to be submitted along with original shown for verification.

ACKNOWLEDGEMENT SLIP - CHANGE/ADDITION OF BANK MANDATE (To be filled by the investor)

Received from:

Mr./Ms/M/s

Folio No. A request for Change/Addition of Bank Mandate.

Date

ISC Stamp, Signature & date