



# HUF Transmission – New Karta

Date: \_\_\_\_\_

To  
The Trustee,  
ICICI Prudential Asset Management Company Ltd.

Dear Sir/ Madam,

I ..... hereby submit

the requests to delete the name and signature of the registered Karta ..... on account of sad demise as per the below given details.

Folio no(s).	
Name of new Karta	
PAN of new Karta	

Contact no. \_\_\_\_\_ Email id: \_\_\_\_\_

The following documents have been submitted for processing my/our abovestated request/embassy attested.

- Death Certificate in original / or photocopy duly attested.
- Duly filled in Annexure I
- Indemnity bond signed by all the surviving coparceners and new Karta on Rs.300/- stamp paper- Annexure V.
- KYC of the new Karta and KYC of HUF
- FATCA form
- UBO (Ultimate Beneficiary Owner) form
- Any other, please specify \_\_\_\_\_

I / We would request you to submit carry out the above changes.

Thanking you  
Yours Sincerely

.....

P.T.O.

**List of Documents to be submitted:**

- Duly filled and signed form
- Indemnity bond signed by all the surviving coparceners and new Karta on Rs.300 stamp paper- Annexure V.
- Death Certificate in original or photocopy duly notarized or attested by gazette officer or a bank manager or embassy attested,
- Duly certified Bank certificate stating that the signature and details of new Karta have been appended in the bank account of the HUF -Annexure I

Note: In case of bank mandate being furnished in a non registered account, then the below stated additional information is required to be submitted.

- 1) In the Annexure 1-PAN details as updated in the bank records also needs to be confirmed.
  - 2) The new karta will include a line in the request letter stating that "Due to \_\_\_\_\_ reasons, I am unable to provide to you the authentication of my signature by the Bank that is registered with you and therefore I am providing to you the authentication of my signature from \_\_\_\_\_ bank, which is currently holding the bank account of \_\_\_\_\_ HUF
- KYC of the new Karta and KYC of HUF, if not already available
  - FACTA form
  - UBO (Ultimate Beneficiary Owner) form
  - In case of no surviving co-parceners and the transmission amount is Rs 5 lacs (Five lakhs) or more OR where there is an objection from any surviving members of the HUF, transmission should be effected only on the basis of any of the following mandatory documents:
    - a. Notarized copy of Settlement Deed, or
    - b. Notarized copy of Deed of Partition, or
    - c. Notarized copy of Decree of the relevant competent Court

In case of non submission of any of the documents or if the documents are not found to be in order, the AMC reserves the right to not register the HUF Transmission – New Karta application submitted.