

*(To be executed on a Non-Judicial Stamp Paper of Rs. 500/- and to be notarized before a Judicial Magistrate or Notary Public)*

(To be signed by the Claimant/s)

**INDEMNITY BOND WITH RESPECT TO TRANSFER OF THE MUTUAL FUND UNITS HELD BY THE DECEASED HOLDER WHERE NOTARISED COPY OF WILL IS AVAILABLE**

**(In case of Transmission of Mutual Fund Units held by a Single Holder/ on death of all unit holders in case of Joint Holding and where amount claimed is less than threshold limit, there is no nominee registration and notarized copy of will is available).**

I/We do hereby solemnly affirm and sincerely state on oath as follows,

I/We state that "Mr. / Ms. (\*) \_\_\_\_\_" passed away on \_\_\_\_\_ and he/she was holding the following Mutual Fund Units:

Sl.No.	Name of Mutual Fund	Scheme Name	Folio No	No. of Units held

The said unit holder died without registering any nominee/s in folio/s on the \_\_\_\_\_ day of \_\_\_\_\_ and left a Will as per which I/we am/are entitle to receive the aforesaid mutual fund units in my/ our names.

I/We have, therefore, approached you with a request to transfer the aforesaid Mutual Fund units in the name of the undersigns

"Mr. / Ms. (#) \_\_\_\_\_"  
on my/our behalf for which I/we execute an indemnity as is herein contained and on relying on the information herein given by us believing the same to be true.

In consideration therefore of my/our request to transfer above said Mutual Fund units to the name of the undersigned "Mr. / Ms. (#) \_\_\_\_\_".

I / we hereby jointly and severely agree and undertake to indemnify and keep indemnified, saved, defended, harmless you and your successors and assigns for all time hereafter against all losses, costs, claims, actions, demands, risks, charges, expenses, damages, etc., whatsoever which you may suffer and/or incur by reason of your, at my/our request, transferring the said Mutual Fund units as herein above mentioned, to the undersigned "Mr. / Ms. (#) \_\_\_\_\_"  
without insisting on production of a succession certificate or letter of administration or an order of the court of competent jurisdiction.

IN WITNESS WHEREOF THE said "Mr. / Ms. (#) \_\_\_\_\_" have here unto set their respective hands and seals this \_\_\_\_\_ day of \_\_\_\_\_.

Signed and delivered by the said Claimants.

1. _____	_____
2. _____	_____
3. _____	_____
Name & Address of the Claimant/s	Signature of the Claimant/s

1. _____	_____
2. _____	_____
Surette/s Name and Address [Mandatory]	Surette/s Signature

\_\_\_\_\_  
Signature of the Notary with Name & Seal

(\*)= Name of the deceased unit holder

(#)= Name of the claimant