

**Annexure - T5: Indemnity Bond with respect to Change of Karta / to Transfer of the Mutual Fund units held by the deceased Karta with production of Death Certificate of Karta**  
**(To be signed jointly by all the coparceners and the new Karta)**

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

I/We inform you that Mr. / Ms. \_\_\_\_\_  
 <Name of the deceased Karta [Unit Holder]> passed away on \_\_\_\_\_, and he was the Karta of the HUF and he was holding the following Mutual Fund Units:

S No.	Name of Mutual Fund	Scheme Name	Folio No	No. of Units Held

I /We inform you that the following are the only living members of the \_\_\_\_\_  
 (Name of the HUF) and that there are no other members / coparceners for the said HUF:

S No.	Name	Age	Date of Birth

I /We further inform you that Mr. \_\_\_\_\_ <Name of the new Karta> is the senior most coparcener of the HUF/new Karta duly appointed by all the members.

I/We have, therefore, approached you with a replace the name of the deceased Karta with the name of new Karta Mr. \_\_\_\_\_ <Name of the new Karta>, 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 replace the name of the Karta in the above said Mutual Fund units in the place of deceased Karta, I/We hereby 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.

IN WITNESS WHEREOF THE said Mr./Ms. \_\_\_\_\_ <Name of the members of HUF> has here unto set their respective hands and seals this \_\_\_\_\_ day of \_\_\_\_\_.

Signed and delivered by the said applicant

- |                                       |                                      |
|---------------------------------------|--------------------------------------|
| 1. _____                              | _____                                |
| 2. _____                              | _____                                |
| 3. _____                              | _____                                |
| Name & Address of members of the HUF* | Signature of the members of the HUF* |

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

Place: \_\_\_\_\_

\_\_\_\_\_  
Signature of Notary [with Name and Seal]

- *Add additional lines wherever applicable*
- *Similarly, this format will be applicable only if Karta is a male member*