

Annexure - T4: Individual Affidavit by the Legal Heir(s)

(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 there is no nominee)

I, Mr. / Ms. _____ <Name of the Legal Heir> son / daughter / spouse of _____ residing at _____ do hereby solemnly affirm and sincerely state on oath as follows.

That Mr. / Mrs. _____ <Name of the deceased Unit Holder> the deceased was holding the following mutual fund units in his / her name as single holder/joint holders:

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

That the deceased had died intestate on _____ for which we are attaching the Death Certificate.

The following are the only legal heir(s) of late Mr. / Mrs. _____ <Name of the deceased Unit Holder> for which we are attaching a Legal Heirship Certificate/ Succession Certificate.

S No	Name of the Legal Heirs	Address	Age	Relationship with the deceased
1				
2				
3				
4				

That out of aforesaid legal heirs Master / Kumari. _____ Aged _____ years is a minor and he / she is being represented Mr. / Ms. _____ <Name of the Guardian> who is none other than his / her father/mother as natural guardian.

We also confirm that there is no other legal heir as stated above to the deceased _____ <Name of the deceased Unit Holder>.

We also indemnify the concerned Mutual Fund and its authorized Registrar and Transfer agent by as separate indemnity letter with a third party surety.

DEPONENT SIGNATURE: _____

VERIFICATION
We hereby solemnly affirm and state that what is stated herein above is true to our knowledge and nothing has been concealed therein and that we are competent to contract and entitled to rights and benefits of the above mutual fund units.
Solemnly affirmed at Signed before me at _____ on _____
_____ Signature of Notary with Official Seal of Notary

Note: Each deponent should sign this affidavit separately.