

Bond of Indemnity to be furnished jointly by all Legal Heirs including the Claimant

(To be submitted on Non-judicial Stamp Paper of appropriate value)

[For Transmission of Units without production of Legal Representation on death of Sole Unit Holder or all Unit Holders in case of Joint Holding, where no nomination has been registered]

(where aggregate value of investment under all folios is up to ₹5 lakhs)

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

That Mr./Ms. _____ *Name of the deceased unit holder* was holding the Units in following schemes/folios :

Scheme Name	Folio No.	No. of units held
1		
2		
3		
4		

That the aforesaid unit holder died *testate** / *intestate** on _____, *and without registering any nomination*, leaving behind him/her the following persons as the only surviving legal heirs according to the Law of Intestate Succession applicable to him/her by which he/she was governed at the time of his/her death.

Name of the legal heir/s	Address	PAN	Age	Relationship with the Deceased
1				
2				
3				
4				

Therefore, I/We, the deponent/s herein has/have, approached _____ Mutual Fund with a request to transfer the aforesaid Units in the name of the undersigned Mr./Ms. _____,

on my/our behalf, without insisting on production of a Probated will, or a Succession Certificate or an order of a competent court, for which 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/transmit the 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, the aforesaid Mutual Fund and its 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 Probated will or a Succession Certificate or an order of the court of competent jurisdiction.

IN WITNESS WHEREOF the said Mr./Ms. _____

_____, have hereunto set their respective hands and seals this day of _____.

Signed and delivered by the said legal heir/s :

Name the Legal Heirs	Signature of the Legal Heirs
1	X
2	X
3	X

(*) = Name of the deceased unit holder

(#) = Name of the claimant/s

SURETY

I/we, the undersigned Surety, certify that the above facts are true to the best of my/our knowledge and bind myself/ourselves as Surety to make good all claims, charges, costs, damages, demands, expenses and losses which the _____ Mutual Fund, its successors and assigns may sustain, incur or be liable for in consequence of complying with the request contained above of the claimant herein and the said Mutual Fund and its successors, assigns will be entitled to claim and realise all claims, charges, costs, damages, demands, expenses and losses from me or from my properties, as the case may be.

S.No	Sureties Name & Address (Mandatory)	PAN	Signature of the Surety
1.			X
2.			X

Signed before me

at: _____

on : _____

Signature of Notary / JMFC

Official stamp & seal of the Notary Magistrate/ Notary & Regn. No.:

Note: *This indemnity is to be executed in the presence of a Judicial Magistrate first class OR a Public Notary*