

Siebel Request No.

For Bank Use:

Customer Account Type:

- Wealth
 Privy
 Resident Individual
 Non-Individual
 Non Resident

CRN Corporate CRN Date

CASA Account Number

Merchant Acquiring Services MID TID

Demat Client ID Investment Account Investment A/c No.

I/We

Mr./Ms. FIRST NAME MIDDLE NAME LAST NAME

Mr./Ms. FIRST NAME MIDDLE NAME LAST NAME

Request you to update your records as per the details provided below.

To update

Name* Mr./Ms. FIRST NAME MIDDLE NAME LAST NAME

Office / Indian (in case of NRI/PIO) Address. Please select the below Options

- Please tick if your Office address is same as your mailing address (where all communications will be sent)
 Change to be done at CRN level (i.e. for all the relationships with the bank)
 Change to be done at above mentioned Account level

Flat Number/Building	Area	City	Pin Code	Street/Block	Landmark	State	Country
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Residence / Overseas (in case of NRI / PIO) Address / Registered Address

- Please tick if your Residence address is same as your mailing address (where all communications will be sent)
 Change to be done at CRN level (i.e. for all the relationships with the bank)
 Change to be done at above mentioned Account level

Flat Number/Building	Area	City	Pin Code	Street/Block	Landmark	State	Country
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Telephone Number
 Office
 Residence
 ISD CODE
 STD CODE

Mode of Operation
 Singly
 Either / Survivor
 Jointly
 Anyone / Survivor

Mobile Number

E-Mail address

Please sign in case changes required in Mobile No. / E-mail ID

Update PAN

Customer's Sign
 (In case of the Non-individual, please provide Sign, Name & Designation with stamp of Organization)

Name of the Aadhaar Holder as in Aadhaar Card Mr./Ms. FIRST NAME MIDDLE NAME LAST NAME

Aadhaar No

- Link Aadhaar number in my all existing Bank accounts under my CRN and to my customer profile.
 Seed my Kotak Bank Account number with NPCI to enable me to receive Direct Benefit Transfer (DBT), as applicable, in my account.
 De-Link my Kotak Bank Account Number and map my Kotak Bank Account Number with NPCI to enable me to receive Direct Benefit Transfer (DBT) as applicable, in my account.

Nomination display on Net Banking & all Customer Deliverables Yes No

Request to Correct Date of Birth (provide a valid age proof)

Customer Acknowledgement

Imp Notes:

(For Individual - at Account level changes, all the account holders need to sign whereas at CRN level changes, respective CRN holder has to sign For Non-Individual, signatures as per MOP required.)

Please Note :

- * To be accompanied by a copy of the gazette notification along with updated PAN Card. If the change of name is on account of marriage, an attested copy of the marriage certificate along with updated PAN Card must be submitted (Applicable for CASA accounts only).
1. For change in address, please provide proof (self attested) of the new address by submitting a copy of Passport / Driving Licence / Election Card / Electricity Bill or Landline Telephone Bill, not more than 3 months old (For Demat only) and for CASA as per KYC Grid. Also for change in address request for a Demat A/c please provide valid identity proof & a copy of latest DP transaction statement along with new address proof.
 2. For updating PAN Number, kindly provide an original copy of PAN Card.
 3. Please provide an ID proof for payment through RTGS / NEFT.
 4. For change of bank details in case of a Demat account; proof of the new bank details are required to be submitted (attested copy of bank statement or copy of Cheque)
 5. Please submit separate requests for different client IDs (For Demat only)
 6. For Demat related requests, the form must be signed by all the account holders (For Individuals) and by Authorized Signatories as registered (For Non-Individuals).
 7. In case of Mutual Fund Investment, submit the "KYC Details Change Form for Individuals / Non Individuals" to KRA (KYC Registration Agency) for affecting address change and contact details change across all AMC's. Forms are available on respective AMC/KRA sites.
 8. In case of Mutual Fund, for any change in mode of operation, change in name, signature & Bank details, customer to give a separate request for each AMC (folio wise) to the Bank or to the AMC directly. In case of name change on account of marriage Notarized copy of Marriage certificate, Pan Card with new name and old and new signature of the investor, if so changed, attested by Bank is required. In case of name change for ING AMC a duly notarized Affidavit on Rs.50/- non judicial stamp paper confirming the name change details is required.
 9. For change in Mobile / E-mail Id, please provide an ID proof.
 10. Please note that address change at account level will be done only when you have mentioned the respective account number at the top.
 11. For change of bank details in case of a NEFT account; details of new bank details are required to be submitted with (cancelled copy of Cheque).
 12. Please note that address change at terminal level will be done only when you have mentioned the respective MID/TID number at the top and address proof given.
 13. The linked Aadhaar enabled bank account will be used for receiving Government payment across schemes & / or any other payment using the Aadhaar based information and NPCI may MAP my primary account in the Aadhaar Mapper of NPCI.

Acknowledgement Slip

We acknowledge the receipt of Customer Modification instruction from Mr. /Mrs. / Ms _____

relating to customer relationship number _____ under service request number _____

Date: _____

Bank Official (Sign and stamp)
For **Kotak Mahindra Bank Ltd.**, _____