

# Mutual Fund Transfer Request Form

A **mutual fund transfer request form** sample provides a standardized template to facilitate the seamless transfer of mutual fund units between accounts. It ensures accuracy and compliance with regulatory requirements, minimizing processing delays. This form is essential for investors looking to manage their portfolios efficiently.

## 1. Investor Details

Full Name:

PAN Number:

Contact Number:

Email Address:

## 2. Transferor (From Account) Details

Folio Number:

Depository Participant (DP) Name:

DP ID:

Client ID:

## 3. Transferee (To Account) Details

Folio Number:

Depository Participant (DP) Name:

DP ID:

Client ID:

## 4. Mutual Fund Details

| Scheme Name          | Option (Growth/Dividend) | ISIN                 | Number of Units      |
|----------------------|--------------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/>     | <input type="text"/> | <input type="text"/> |

## 5. Declaration & Authorization

I/We hereby authorize and request the above-mentioned mutual fund units to be transferred as per details provided. I/We confirm that the information provided is true and accurate to the best of my/our knowledge.

|                          |                      |
|--------------------------|----------------------|
| Date:                    | <input type="text"/> |
| Signature of Transferor: | <hr/>                |
| Signature of Transferee: | <hr/>                |