

Process to change Name in Trading cum Demat Account for Individual Category

Checklist for Name change :-

Query	Documentation
Name change in case of married women	1. CRF 2. KRA form 3. Copy of pan card with new name 4. Marriage certificate or publication of name change in official gazette or Copy of Passport showing husband's name
Reason other than marriage (only for Karnataka and Punjab)	1. CRF 2. Sworn affidavit executed before the Notary Pubic/Magistrate of First Class/ Executive Magistrate mentioning the reason for change of name and customer complete address 3. Paper publication in one local news paper and one national news paper 4. KRA cum CKYC form 5. Copy of pan card with new name 6. Copy of address proof with new name
Document for name correction	1. Annexure B (with undertaking) 2. CRF 3. KRA form 4. Copy of pan card and aadhaar

Important Note for name correction :-

1. Name correction here means correction of spelling mistakes
2. Expansion of the name by incorporating the fully expanded name and/or addition of middle name
3. Abbreviation of name

Formats required to process "Name Change" are as follows :-

CRF - Available on website

Annexure B (with undertaking) - Available on website

Aadhaar Consent - Available on website