

MUTUAL FUND**Request for change in status from Minor to Major**To:
The Trustees

Mutual Fund

Name of the Applicant (unitholder who is requesting for change of status from MINOR to MAJOR)

Mr./Ms.																								
Date	D	D	M	M	Y	Y	Y	Y	PAN															
Tax Status: ☐ Resident Individual ☐ NRI ☐ PIO ☐ Others (Please Specify)																								
☐ KYC Acknowledgment attached ☐ KYC form attached ☐ C-KYC Identification No.																								
Please tick (✓) whichever is applicable																								
Name of the Guardian Mr./Ms. _____																								
Relationship with the applicant ☐ Father ☐ Mother ☐ Court Appointed Guardian																								

I, the above applicant, hereby request you to change my status from Minor to Major in the following Folios and delete the Guardian's name therein as I have since become a major, and update the details provided herein in your records.

Folio No(s).		
1.	2.	3.
4.	5.	6.
7.	8.	9.

CONTACT DETAILS OF THE APPLICANTThe Email ID belongs to (Mandatory Please ✓) ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ PMS ☐ Custodian ☐ POAThe Mobile No. belongs to (Mandatory Please ✓) ☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents ☐ Guardian ☐ PMS ☐ Custodian ☐ POA

Mobile No.+91-	Tel. No. STD -
Email Address	

ADDRESS OF THE APPLICANT

Address Line 1																	
Address Line 2																	
City:	State										PIN						

(Please note that address will be updated as per applicant's address on KYC form /KYC Registration Agency records)

BANK ACCOUNT DETAILS OF THE APPLICANT

Bank Name																																		
Account No.															11-digit IFSC Code																			
A/c. Type ☐ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR															9-digit MICR Code																			
Name of bank branch																																		
City															PIN																			
Please attach & tick(✓) ☐ Cancelled cheque with applicant's name printed OR ☐ Applicant's Bank Statement/Passbook																																		

ADDITIONAL KYC INFORMATION (Please tick ✓ whichever is applicable)

Occupation ☐ Private Sector Service ☐ Public Sector Service ☐ Government Service ☐ Business ☐ Professional ☐ Agriculturist ☐ Retired ☐ Home Maker ☐ Student ☐ Forex Dealer ☐ Others _____																								
The applicant is ☐ a Politically Exposed Person ☐ Related to a Politically Exposed Person ☐ Neither (Not applicable)																								
Gross Annual Income (₹) ☐ Below 1 Lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ 25 Lacs-1crore ☐ >1 crore																								

FATCA AND CRS INFORMATION

Country of Birth _____	Place of Birth _____	
Nationality _____		
Are you a tax resident of any country other than India? ☐ Yes ☐ No If Yes, please mention all the countries in which you are resident for tax purposes and the associated Taxpayer Identification Number and its identification type in the column below		
Country	Tax-Payer Identification Number	Identification Type

NOMINATION (Please tick (✓) one of the options below)

☐ I wish to make a nomination and hereby nominate the person/s more particularly described in the Nomination Form attached herewith, to receive the Units held my folio in the event of my death. *{Recommended}*

☐ DO NOT wish to make a nomination (*Please tick ✓ if you do not wish to nominate anyone*)

DECLARATION AND SIGNATURE OF THE APPLICANT

I have attached herewith all the relevant / required documents as indicated below.

I confirm that the information provided above is true and correct to the best of my knowledge and belief.

I undertake to keep _____ Mutual Fund / its AMC/RTA informed about any changes/modification to the above information in future and also undertake to provide any other additional information as may be required by the AMC / RTAs.

I hereby authorize _____ Mutual Fund and its AMC/RTA to share/disclose any of the information provided by me/us, including any changes in respect thereof to the Mutual Fund's Bankers or my Distributor / Investment Advisor and to such other service providers as may be necessary for any operational reason, including to verify/validate my / our bank account details. I / We also authorize the Mutual Fund & its AMC/RTA to provide/ share any of the information provided by me/us including my holdings in the Mutual Fund to any governmental or statutory or judicial authorities/agencies as required by law without any obligation of informing me/us of the same.

My signature hereinbelow has been attested by ☐ the Guardian on record ☐ My bankers ☐ Notary / JMFC

Place _____

Date _____

Signature of Applicant _____

SIGNATURE ATTESTATION

(To be attested by the Guardian (as registered in the folio of the applicant who has become a major) or a Notary or Judicial Magistrate First Class (JMFC) @

Name of the Guardian / Stamp of the Notary/JMFC	The above signature of the applicant duly attested by me _____ Signature
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@ Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure 1

Documents attached –

- ☐ Copy of PAN Card of applicant
☐ KYC Acknowledgment OR ☐ KYC form of applicant
☐ Cancelled cheque with applicant's name pre-printed OR ☐ Applicant's Bank Statement/Passbook
☐ Annexure-I – Bankers Attestation of Signature of the applicant
☐ Nomination Form