

REQUEST FORM FOR CHANGE OF STATUS (MINOR TO MAJOR)



PAN / PEKRN (Mandatory)

Folio No

This is to inform you that I, the Unitholder in the above mentioned folio, have attained the age of majority and you are requested to transfer all the unit holding in my name and remove Guardian Name. Also update the following details in your records and confirm the same.

Name (Name and Date of Birth as per PAN)

☐ KYC Acknowledgement (Enclosed)

Guardian's Name

(mandatory if PAN not provided)

Gender

Date of Birth

D

D

M

M

Y

Y

Y

Y

Place of Birth

Country of Birth

Nationality

Tax Status

☐ Resident Individual

☐ Non Resident Individual

Mobile No.

Mobile No belongs to:-

☐ Self

☐ Spouse

☐ Dependent Children

☐ Dependent Siblings

☐ Dependent Parents

☐ Guardian

☐ PMS

☐ Custodian

☐ POA

Email ID

Email id belongs to:-

☐ Self

☐ Spouse

☐ Dependent Children

☐ Dependent Siblings

☐ Dependent Parents

☐ Guardian

☐ PMS

☐ Custodian

☐ POA

Type of Address given at KRA

☐ Residential

☐ Business

☐ Registered Office

Occupation Details
[Please tick (✓)]

☐ Service

☐ Private Sector

☐ Government Service

☐ Student

☐ Professional

☐ Housewife

☐ Business

☐ Retired

☐ Agriculture

☐ Proprietorship

☐ Others

(Please specify)

Gross Annual Income (₹)
[Please tick (✓)]

☐ Below 1 Lac

☐ 1 - 5 Lacs

☐ 5 - 10 Lacs

☐ 10 - 25 Lacs

☐ > 25 Lacs - 1 Crore

☐ > 1 Crore

Politically Exposed Person (PEP) Status*

☐ I am PEP

☐ I am Related to PEP

☐ Not Applicable

*PEP are defined as individuals who are or have been entrusted with prominent public functions in foreign country, e.g. Heads of State or of Governments, senior politicians, senior Government / judicial / military officers, senior executives of state owned corporations, important political party officials etc.

BANK ACCOUNT DETAILS (Please note that as per SEBI Regulations it is mandatory for investors to provide their bank account details)

Account Number

Account Type [Please tick (✓)]

☐ Savings

☐ Current

☐ NRE

☐ NRO

☐ FCNR

☐ Others

(please specify)

Name of the Bank

Branch Name

Branch City

IFSC Code

MICR Code

NOMINATION DETAILS

☐ I/We wish to nominate

☐ I/We do not wish to nominate^{ss}

☐ I/We want the details of my/our nominee to be printed in the statement of account

☐ Name of Nominee(s) with% Nomination: ☐ Yes / No (Default)

Nominee Name*	Nominee Address ^{ss}	Mobile no ^{ss}	Email ID ^{ss}	Allocation* (Total 100%)
Nominee 1				
Nominee 2				
Nominee 3				

(a) *Mandatory (b) Other Details (Guardian details to be furnished in case nominee is a minor) (c) **For identification details investor can provide PAN, Aadhaar (Last 4 digit), Driving license or Passport (d) \$ If Nominee's Address, Mobile no and Email id is same as that of the investor please write 'Same as investor'.

Nominee 1	Identification Details**	Relationship with investor*	Guardian Name (In case of Minor)	DOB in case of Minor
Nominee 2	Identification Details**	Relationship with investor*	Guardian Name (In case of Minor)	DOB in case of Minor
Nominee 3	Identification Details**	Relationship with investor*	Guardian Name (In case of Minor)	DOB in case of Minor

^{ss}OPT-OUT: I/We hereby confirm that I/We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in my / our folio.

Sign here

Signature of First Holder (Major)

Continued overleaf

ACKNOWLEDGEMENT

Folio No



We acknowledge the receipt of the request for change of status from Minor to Major from Mr. / Ms. / M/s.

Date of receipt of CAMS CSC

D

D

M

M

Y

Y

Y

Y

stamp & signature

FATCA & CRS INFORMATION [Please tick (✓)]. For Individual & HUF (Mandatory)

The below information is required for all applicants / guardian

Address Type : ☐ Residential or Business ☐ Residential ☐ Business ☐ Registered Office (for address mentioned in form / existing address appearing in Folio)

Is the applicant (s) / Guardian's Country of Birth / Citizenship / Nationality / Tax Residency other than India ? ☐ Yes ☐ No

If Yes, please provide the following information [mandatory]

Please indicate all countries in which you are resident for tax purposes and the associated Tax Reference numbers below.

Sr. No.	Country of Tax Residency#	Tax Payer Identification Number^	Identification Type [TIN or other, please specify]
1.			
2.			
3.			

To also include USA, where the individual is the citizen / green card holder of USA. ^In case Tax Identification Number is not available, kindly provide its functional equivalent.

DECLARATION

I/We have read, understood and agree to comply with the terms and conditions of the Statement of Additional Information, Scheme Information Documents and Key Information Memorandum of the Scheme(s), Foreign Account Tax Compliance Act and Common Reporting Standards, statutory requirements prescribed by SEBI, AMFI, Prevention of Money Laundering Act, 2002 (PMLA), Privacy Policy of Bandhan AMC Limited available on the website of Bandhan Mutual Fund www.bandhanmutual.com and all applicable rules and regulations and hereby confirm that I/We have not received nor been induced by any rebate or gifts, directly or indirectly, to make this investment. I/We hereby declare that I/we do not have any existing Micro SIPs which together with the current application will result in a total investments exceeding ₹ 50,000 in a year. The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. For NRIs / PIOs / FPIs only: I / We confirm that I am / we are Non Resident Indians / Person(s) of Indian Origin / Foreign Portfolio Investors but not (i) United States persons as per applicable Regulations or (ii) residents of Canada, and I / we have remitted funds from abroad through approved banking channels or from funds in my / our Non-Resident External / Non-Resident Ordinary / FCNR Account maintained in accordance with applicable RBI guidelines. I/We hereby provide my/our consent to Bandhan AMC Limited for (i) collecting, storing and usage of personal information for the purposes of processing my/our application and providing the services to which I/we have subscribed and for the purposes of meeting legal and regulatory requirements; (ii) receiving updates on promotional material and transaction related communication via mail, telecall, SMS, etc.

SIGNATURE

Signature of First Holder (Major)	Guardian Attestation	Bank Attestation
OR		
Name	Registered Guardian's Name 	Branch Seal with attester's name, designation and employee number

INSTRUCTIONS

- The documents submitted with this request should reflect the Name of the Sole / First Unit holder, Bank Name, Bank Account Number, MICR Code, IFSC and the Bank Account Type clearly.
- The last entry in the Bank Passbook / Bank Statement should not be more than 3 months old.
- A copy of any of the above documents can be submitted provided the original is shown at the ISC counter for verification.
- Self attested KYC acknowledgment copy. (Date of the letter & KYC acknowledgment should be after the date of attaining majority).
- New bank account details cannot be submitted for updation, in case redemption is requested with this request.
- Applicant's name and date of birth should be as per PAN.

CHECKLIST

Sr. No.	Documents	Status [Please (✓)]
1.	Document proof for bank account (any one of the following) : A. Cancelled original cheque leaf (reflecting name and account number) B. Photocopy of cheque leaf (reflecting name and account number) accompanied with the original cheque leaf for verification at the offices of Bandhan AMC Limited C. Bank passbook or bank account statement (certified by the bank manager) D. Letter from the bank for the new bank account / Passbook.	☐
2.	New bank account proposed to be registered (reflecting name and account number)	☐
3.	KYC acknowledgement letter	☐
4.	Attested age proof	☐
5.	Declarations for investors who are US persons (if applicable)	☐

Toll free 1800 266 6688 / 1800 300 66688
Available Between
9:00 am - 6:00 pm on weekdays

Please note our investor
service email id
investormf@bandhanamc.com

www.bandhanmutual.com