

WHITEOAK CAPITAL MUTUAL FUND

Request for change in status from Minor to Major

To:

The Trustees

WhiteOak Capital Mutual Fund

Form MAM

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

Mr./Ms.									
Date of Birth		/		/		PAN			
Tax Status: ☐ Resident Individual ☐ NRI ☐ PIO ☐ Others (please specify)									
☐ KYC Acknowledgment attached ☐ KYC form attached ☐ C-KYC Identification No. <i>Please tick✓ whichever is applicable</i>									
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 Applicant

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

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 (Please specify)		
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

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. <i>{Recommended}</i>
☐ I DO NOT wish to make a nomination <i>(Please tick ✓ if you do not wish to nominate anyone)</i>

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 WhiteOak Capital 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 WhiteOak Capital 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 herein below 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 _____

@ Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure I

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