# 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 of Birth / / PAN I					
Tax Status: Resident Individual INRI I 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.

F	Tolio 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 bar	k branch	
City		PIN
Please attac	$ch & tick \checkmark \Box Cancelled cheque with applicant's name$	printed <b>OR</b> Applicant's Bank Statement/Passbook

## **Additional KYC information** (Please tick√ whichever is applicable)

<b>Occupation</b> 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	Identification Type	

**Nomination** (*Please tick* ( $\checkmark$ ) *one of the options below*)

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

**I DO NOT** wish to make a nomination (*Please tick*  $\checkmark$  *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) <sup>@</sup>		
sted by me		

@ Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure 1

## **Documents attached** –

- □ Copy of PAN Card of applicant
- $\square$  KYC Acknowledgment OR  $\square$ KYC form of applicant
- Cancelled cheque with applicant's name pre-printed OR Capplicant's Bank Statement/Passbook
- $\square$  Annexure-I Bankers Attestation of Signature of the applicant
- $\square$  Nomination Form