



**4. PARENT / LEGAL GUARDIAN OF MINOR APPLICANT**

Name of the Parent / Legal guardian of Minor Mr. / Ms. \_\_\_\_\_

Relationship with Minor  Father  Mother  Legal Guardian Proof attached [Please (✓)]

Nationality \_\_\_\_\_

PAN\*/PEKRN\* \_\_\_\_\_

CKYC Number \_\_\_\_\_ KYC\* (Mandatory) [Please (✓)]  Proof Attached

Address \_\_\_\_\_ PIN \_\_\_\_\_

Overseas Address (Mandatory for NRI) \_\_\_\_\_

\_\_\_\_\_

CITY \_\_\_\_\_ COUNTRY \_\_\_\_\_ ZIP CODE \_\_\_\_\_

Tel. : STD Code Office \_\_\_\_\_ Country Code \_\_\_\_\_ \_\_\_\_\_

Mobile No \_\_\_\_\_ Email \_\_\_\_\_

**5 ALTERNATE CHILD INFORMATION**

Name of the Alternate Child Mast. / Miss. \_\_\_\_\_  
(Not exceeding 18 years of age)

Nationality \_\_\_\_\_ Date of Birth 

D	D	M	M	Y	Y	Y	Y
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 Proof attached [Please (✓)]

Name of the Parent / Legal guardian of Alternate Child Mr. / Ms. \_\_\_\_\_

Relationship with Alternate Child [Please (✓)]  Father  Mother  Court appointed Legal Guardian Proof attached [Please (✓)]

Address of the Alternate Child \_\_\_\_\_ PIN \_\_\_\_\_

\_\_\_\_\_

	Status (of the Alternate Child) (Mandatory) [Please (✓)]	Occupation (of the Alternate Child) (Mandatory) [Please (✓)]
Single <input type="checkbox"/>	Resident <input type="checkbox"/> NRI/PIO/OCI <input type="checkbox"/> Others _____ (please specify)	Student <input type="checkbox"/> Others _____ (please specify)

**6. INVESTMENT AND PAYMENT DETAILS**

One time Investment  Systematic Investment Plan (SIP) (Please submit SIP Enrolment & OTM Form)

Scheme Name	SBI MAGNUM CHILDREN'S BENEFIT FUND - INVESTMENT PLAN		
Plan (Please ✓)	<input type="checkbox"/> Regular	<input type="checkbox"/> Direct	
Option (Please ✓)	<input type="checkbox"/> Growth		
Payment Mode	<input type="checkbox"/> Cheque	<input type="checkbox"/> DD (Third Party Declaration Mandatory)	<input type="checkbox"/> Fund Transfer <input type="checkbox"/> RTGS
Cheque / D.D. No. & Date	Cheque / DD Amount (Rs.)	Drawn on Bank and Branch	

TEAR HERE

**Investment Manager :**

SBI Funds Management Pvt. Ltd.  
(A Joint Venture between SBI & AMUNDI)  
9th Floor, Crescenzo, C-38 & 39,  
G Block, Bandra Kurla Complex,  
Bandra (East), Mumbai - 400 051  
Tel: 022- 61793511  
Email: customer.delight@sbimf.com

**TOLL FREE NO : 1800 425 5425**  
**Website : www.sbimf.com**

**Registrar:**

Computer Age Management Services Ltd.,  
SEBI Registration No. : INR000002813)  
Rayala Towers, 158, Anna Salai, Chennai - 600 002  
Email: enq\_L@camsonline.com  
Website: www.camsonline.com

**7. FATCA & CRS INFORMATION: For Parent and Legal Guardian**

The below information is required for Minor and Guardian

Is the Country of Birth / Citizenship / Nationality / Tax Residency other than India?

Beneficiary Child  Yes  No Parent/ Legal Guardian  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.

Details	Minor	Parent/ Legal Guardian
Country of Birth		
Place/City of Birth		
Nationality		
Country of Tax Residency 1		
Tax Payer Ref. ID No^		
Identification Type [TIN or Other, Please specify]		
Country of Tax Residency 2		
Tax Payer Ref. ID No.2		
Identification Type [TIN or Other, Please specify]		
Country of Tax Residency 3		
Tax Payer Ref. ID No. 3		
Identification Type [TIN or Other, Please specify]		

^ In case Tax Identification Number is not available, kindly provide its functional equivalent. If no TIN is yet available or has not yet been issued, please provide an explanation and attach this to the form. (Please attach additional sheets if necessary and mention all countries in which applicant is a tax resident & provide relevant details)

**8. OTHER PERSONAL INFORMATION (PARENT/LEGAL GUARDIAN)**

Occupation (Please ✓)

Professional  Business  Government Service  Agriculturist  Private Sector Service  Retired  
 Public Sector Service  Housewife  Student  Forex Dealer  Doctor  Others\_\_\_\_\_

Gross Annual Income in Rs. (Please ✓):

Below 1 Lac  1-5 Lacs  5-10 Lacs  10-25 Lacs  25 Lacs - 1 Cr.  > 1 Cr.

OR Network in Rs.

Networth as of date  Politically Exposed Person [PEP]  Yes  No  Related to PEP

Type of address given at KRA  Residential  Business  Reg. Office

**9. DEMAT ACCOUNT DETAILS (OPTIONAL)**

If you wish to hold units in Demat mode, please provide below details and enclose  Latest Client Master /  Demat Account Statement

Please ensure that the sequence of names as mentioned in the application form matches with that of the account held with the Depository Participant.

National Securities Depository Limited (NSDL)	Central Depository Services (India) Limited (CDSL)
Depository Participant Name _____	Depository Participant Name _____
DP ID No. <input type="text" value="I N"/>	Beneficiary Account No. _____
Beneficiary Account No. _____	_____

Please note wherever units are allotted in Demat Mode, Statement of Account will be issued by the Depository concerned.

**NOTE: Non-Individual investors should mandatorily fill separate FATCA/CRS & UBO Form (Annexure-I) alongwith this form.**

**10. GO-GREEN INITIATIVE:**

As part of Go-Green initiative, issuance of physical copy of scheme-wise annual reports or abridged summary is limited to those investors whose email id is not available and who specifically opt to receive it in physical form. Please tick here only if you wish to receive the same in physical mode

**11. DECLARATION**

I/We confirm that the information provided in this form is true & accurate. I/We have read and understood the contents of all the scheme related documents and I/We hereby confirm and declare that (i) I/We have not received or been induced by any rebate or gifts, directly or indirectly, in making this investment; (ii) the amount invested/to be invested by me/us in the scheme(s) of SBI Mutual Fund ("the Fund") is derived through legitimate sources and is not held or designed for the purpose of contravention of any act, rules, regulations or any statute or legislation or any other applicable laws or any notifications, directions issued by any governmental or statutory authority from time to time; (iii) the money invested by me in the schemes of the Fund do not attract the provisions of Foreign Contribution Regulations Act ("FCRA"); (iv) I/We am/are aware that a U.S. person (within the definition of the term 'US Person' under the US Securities laws) / resident of Canada are not eligible for investments with the Fund and I/We am/are not a U.S. person/resident of Canada; (v) the ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him/her for the different competing schemes of various mutual funds from amongst which a scheme of the Fund is being recommended to me/us; (vi) \* as per the Memorandum and Articles of Association of the Company, Bye laws, Trust Deed or Partnership Deed and resolutions passed by the Company / Firm / Trust, I/We am/are authorised to enter into the transactions for and on behalf of the Company/Firm/Trust; (vii) \*\* I/We am/are Non Resident of Indian Nationality/Origin and that funds for the subscriptions have been remitted from abroad through approved banking channels or from my/our Non Resident External/Ordinary account/FCNR Account; (viii) all information provided in this application form together with its annexures is/are true and correct to the best of my/our knowledge and belief and I/We shall be liable in case any of the specified information is found to be false or untrue or misleading or misrepresenting; (ix) that we authorize you to disclose, share, remit in any form, mode or manner, all / any of the information provided by me/ us, including all changes, updates to such information as and when provided by me/ us to the Fund, its Sponsor, AMC, trustees, their employees/RTAs or any Indian or foreign governmental or statutory or judicial authorities/agencies including but not limited to SEBI, the Financial Intelligence Unit-India, the tax/revenue authorities in India or outside India wherever it is legally required and other such regulatory/investigation agencies or such other third party, on a need to know basis, without any obligation of advising me/us of the same; (x) I/ We shall keep you forthwith informed in writing about any changes/modification to the information provided or any other additional information as may be required by you from time to time; (xi) Towards compliance with tax information sharing laws, such as FATCA and CRS: (a) the Fund may be required to seek additional personal, tax and beneficial owner information and certain certifications and documentation from investors. I/We ensure to advise you within 30 days should there be any change in any information provided; (b) In certain circumstances (including if the Fund does not receive a valid self-certification from me) the Fund may be obliged to share information on my account with relevant tax authorities; (c) I/We am aware that the Fund may also be required to provide information to any institutions such as withholding agents for the purpose of ensuring appropriate withholding from the account or any proceeds in relation thereto; (d) as may be required by domestic or overseas regulators/ tax authorities, the Fund may also be constrained to withhold and pay out any sums from my/our account or close or suspend my account(s) and (e) I/We understand that I am / we are required to contact my tax advisor for any questions about my/our tax residency; (f) I have understood the information requirements of this Form (read along with the FATCA/CRS Instructions) and hereby confirm that the information provided by me/us on this Form including the taxpayer identification number is true, correct, and complete. I also confirm that I have read and understood the FATCA Terms and Conditions below and hereby accept the same. (xii) If the name given in the Application is not matching PAN, application may liable to get rejected or further transactions may be liable to get rejected.

\* Applicable to other than Individuals / HUF; \*\* Applicable to NRIs;

<b>SIGNATURE(S)</b>	⊗		
<b>1<sup>st</sup> Applicant / Parent / Legal Guardian</b>			
<b>Date</b>		<b>Place</b>	

