

Request for change in status from Minor to Major



Form MAM

To:
The Trustees,
HDFC Mutual Fund

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

Mr./Ms. _____

Date of Birth: 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):- _____

Contact details of the Applicant

Mobile No. +91 _____ Tel. No. STD - _____

Email Address _____

This mobile number belongs to (Mandatory Please ✓): Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian POA Custodian (for FPIs only) PMS

This email id belongs to (Mandatory Please ✓): Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian POA Custodian (for FPIs only) PMS

Bank Account Details of the Applicant

Bank Name _____

Account number _____ 11-Digit IFSC _____

A/C type SB Current NRO NRE FCNR 9-Digit MICR No. _____

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 _____ (Please specify)

The applicant is a Politically Exposed Person Related to a Politically Exposed Person Neither (Not applicable)

Gross Annual Income (Rs.) 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

ACKNOWLEDGEMENT SLIP (To be filed in by the Investor) [For any queries please contact our nearest Investor Service Centre or call us at our Customer Service Number 1800 3010 6767 / 1800 419 7676 (Toll Free)]

Date : _____

Head Office : HDFC House, 2nd Floor, H.T. Parekh Marg, 165-166, Backbay Reclamation, Churchgate, Mumbai - 400 020.

Received from Mr. / Ms. / M/s. _____

[For any queries please contact our nearest Investor Service Centre or call us at our Customer Service Number 1800 3010 6767 / 1800 419 7676 (Toll Free)]

ISC Stamp & Signature _____

e-mail us at: hello@hdfcfund.com or visit our website: www.hdfcfund.com Missed Call Number - +91 85069 36767

Nomination

I/We wish to make a nomination. [As per details given below]

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 implications / issues involved in non-appointment of any nominee(s) and am/ are further aware that in case of my demise / death of all the unit holders in the folio, my / our legal heir(s) would need to submit all the requisite documents issued by the Court or such other competent authority, as may be required by the Mutual Fund / AMC for settlement of death claim / transmission of units in favour of the legal heir(s), based on the value of the units held in the mutual fund folio/s.

I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my / our account/ folio in the event of my / our demise, as trustee and on behalf of my/ our legal heir(s)*. This nomination shall supersede any prior nomination made by us/me if any.

Nomination can be made upto three nominees in the account.	Details of 1st Nominee	Details of 2nd Nominee	Details of 3rd Nominee
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Mandatory information

1	Name of the nominee(s) (Mr./Ms.)			
2	Share of each Nominee[#]	%	%	%
3	Date of Birth (for Minor)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
4	Relationship with the Applicant (select one)	<input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son Others (please specify) _____	<input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son Others (please specify) _____	<input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son Others (please specify) _____
5	Nominee/ Guardian (in case of Minor) Identification details [Please tick any one of the following and provide ID Number and no copies required].	<input type="checkbox"/> PAN <hr/> <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) <hr/> <input type="checkbox"/> Driving License _____	<input type="checkbox"/> PAN <hr/> <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) <hr/> <input type="checkbox"/> Driving License _____	<input type="checkbox"/> PAN <hr/> <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) <hr/> <input type="checkbox"/> Driving License _____
6	Address of Nominee(s)/ Guardian in case of Minor			
	City / Place: State & Country			
		Pincode: <input type="text"/>	Pincode: <input type="text"/>	Pincode: <input type="text"/>
7	Mobile of nominee(s)/ Guardian in case of Minor			
8	Email ID of nominee(s)/ Guardian in case of Minor			

Non-mandatory details

9	Nominee Guardian Name (in case Nominee is Minor)			
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I / We want the details of my / our nominee to be printed in the statement of holding or statement of account, provided to me/ us by the AMC / DP as follows; (please tick, as appropriate)

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

This nomination shall supersede any prior nomination made by the account holder(s), if any

Nomination (Contd...)		
Signature(s) – As per mode of holding in demat accounts / MF Folio(s).		
	Name of the Holder	Signature / Thumb Impression
Sole / First Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
Second Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
Third Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
<p>* Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature. # Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form.</p>		
<p>Note: The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)</p>		

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: _____	Signature of Applicant							
Date: <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px; text-align: center;">D</td> <td style="width: 20px; height: 20px; text-align: center;">D</td> <td style="width: 20px; height: 20px; text-align: center;">M</td> <td style="width: 20px; height: 20px; text-align: center;">M</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> </tr> </table>		D	D	M	M	Y	Y	Y
D	D	M	M	Y	Y	Y	Y	

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 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-1 – Bankers Attestation of Signature of the applicant Nomination Form