Invesco Mutual Fund

Request for change in status from Minor to Major

To:

The Trustees

Invesco Mutual Fund

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. *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).		
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 | | | | | |
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 (₹) ☐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 (✓) 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. *{Recommended}*
☐ I **DO NOT** wish to make a nomination *(Please tick ✓ 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 **Invesco** 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 **Invesco** 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)** @

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-I – Bankers Attestation of Signature of the applicant
☐ Nomination Form