

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			
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		

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

☐ 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>

Signature of Applicant _____

Name of the Guardian / Stamp of the Notary/JMFC	The above signature of the applicant duly attested by me _____ Signature
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- ☐ 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