

## REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR

To:  
**SBI Mutual Fund**

### 1. Details of the Applicant (unitholder who is requesting for change of status from MINOR to MAJOR)

Mr./Ms.									
PAN									
Tax Status <input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI <input type="checkbox"/> PIO <input type="checkbox"/> Others (please specify)									
<input type="checkbox"/> KYC Acknowledgment attached <input type="checkbox"/> KYC form attached <input type="checkbox"/> C-KYC Identification No.									
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)

I, the above applicant, hereby request you to change my status from Minor to Major in the following Folios and remove the Guardian's name therein as I have since become a major, and update the details provided herein in your records.

**Folio No(s).**

### 2. Contact details of the Applicant

#### Confirmation/Update of Email Address in aforesaid folio(s)

Email Address

Email address specified above belongs to : (Please tick any one option from below)

Self  Spouse  Guardian (for Minor investment)  Dependent Children  Dependent Parents  
 Dependent Siblings  PMS  Custodian  POA

#### Confirmation/Update of Mobile Number in aforesaid folio(s)

Mobile Number

Mobile Number specified above belongs to : (Please tick any one option from below)

Self  Spouse  Guardian (for Minor investment)  Dependent Children  Dependent Parents  
 Dependent Siblings  PMS  Custodian  POA

### 3. Bank Account Details of the Applicant (Multiple Bank Accounts Registration Form available at www.sbimf.com)

Bank Name									
Account No.									
A/c Type <input type="checkbox"/> SB <input type="checkbox"/> Current account <input type="checkbox"/> NRO <input type="checkbox"/> NRE <input type="checkbox"/> FCNR					11-digit IFSC				
Bank Branch					9-digit MICR No.				
Branch City				State			PIN		

Please attach & tick  Cancelled cheque with applicant's name printed OR  Applicant's Bank Statement / Passbook

### 4. Additional KYC information (Please tick ✓ whichever is applicable)

Occupation <input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional									
<input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Home Maker <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others (please specify)									
Gross Annual Income (₹) <input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> 25 Lacs- 1 crore <input type="checkbox"/> >1 crore									
The applicant is <input type="checkbox"/> a Politically Exposed Person <input type="checkbox"/> Related to a Politically Exposed Person <input type="checkbox"/> Neither (Not applicable)									

### 5. FATCA and CRS information

Place of Birth _____									
Country of Birth _____					Nationality _____				
Are you a tax resident of any country other than India? <input type="checkbox"/> Yes <input type="checkbox"/> 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		

## 6. Nomination

I wish to nominate the following person/s to receive the proceeds in the event of death. (For individual investors, Nomination is mandatory. However, in case you do not wish to nominate please sign in point 7)

	Nominee 1	Nominee 2	Nominee 3
<b>Name of the Nominee</b>			
<b>PAN of the Nominee</b>			
<b>Name of the Guardian</b> (In case Nominee is Minor)			
<b>Allocation %</b> (Mandatory if more than one Nominee) (Should not be in decimal)			
<b>Relationship with Nominee</b>			
<b>Date of Birth*</b> (Mandatory if Nominee is Minor)			
<b>Signature of Nominee/Guardian</b> (*Mandatory in case of Minor Nominee)			
	<b>Signature of Nominee/Guardian</b>	<b>Signature of Nominee/Guardian</b>	<b>Signature of Nominee/Guardian</b>

## 7. No Nominee declaration

I hereby confirm that I do not wish to appoint any nominee(s) for my mutual fund units held in my folio and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

\_\_\_\_\_  
Signature of Applicant

## 8. 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 SBI 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 SBI 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 (or)  Notary / JMFC (or)  My banker

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
---	--

OR

**(To be attested by Bank)**

This is to certify that the below investor Mr./Ms. \_\_\_\_\_ residing in the above address is holding the above specified bank account with our bank branch. Further, the above signature of the unitholder is matching with the specimen signature available in our records.

Name of the Bank Manager		
Name of the Bank		
Bank Account Number		
Designation		
Employee Code		
Contact Number		<b>Signature of bank manager with Bank's seal</b>

### 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