

# REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR



Date: \_\_\_\_\_

To,  
The Trustees  
8th floor, E-Core, Solitaire Business Park (formerly Marvel Edge), Viman Nagar, Pune 411014

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

Name Mr./Ms. \_\_\_\_\_

Date of Birth  PAN:

Tax Status:  Resident Individual  NRI  PIO  Others (please specify) \_\_\_\_\_

KYC Detail (Please tick ✓ whichever is applicable):  KYC Acknowledgment attached  KYC form attached  C-KYC Identification No.

Name of the Guardian Mr./Ms. \_\_\_\_\_

Relationship with the applicant : [Please (✓) tick whichever is applicable]

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 -

Mobile No. provided pertains to  Self  spouse  Dependent children  Dependent Siblings  Dependent Parents  A Guardian in case of a minor

Email Address (Email Id in CAPITAL letters only). \_\_\_\_\_

Email ID provided pertains to  Self  spouse  Dependent children  Dependent Siblings  Dependent Parents  A Guardian in case of a minor

### Address of the Applicant

(Please note that address will be updated as per applicant's address on KYC form / KYC Registration Agency records)

Address Line 1 \_\_\_\_\_

Address Line 2 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ PIN

### Bank Account Details of the Applicant

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

Name of Bank \_\_\_\_\_ A/c . Type (✓)  SB  Current  NRO  NRE  FCNR

Account No.  Bank Branch \_\_\_\_\_

Branch City \_\_\_\_\_ PIN  IFSC Code\*  MICR Code\*\*

(\*11 character code) (\*\*9-digit number)

### 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

### 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.

I DO NOT wish to opt for nomination as per the attached Annexure - A ( Mandatory- to Submit Declaration form for opting out of nomination)

**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

**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 Bajaj Finserv 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 Bajaj Finserv 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 &amp; 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
	<hr style="width: 30%; margin: 0 auto;"/> 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 **OR**  Declaration form for Opting out of Nomination