

# 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
	<div>_____</div> <div>Signature</div>

@ 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