REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR

BAJAJ MUTUAL FUND

Date: D D M M Y Y Y Y

To,

The Trustees

1101A and 1101B, 11th Floor, Sky One Corporate Park – Tower 1, Pune, Survey No. 239/2, Sunset Blvd MHADA Colony, Lohegaon, Pune – 411032.

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

Name Mr./Ms.

Date of Birth D D M M Y Y Y Y **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 ID: (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 Code**

Bank Account Details of the Applicant

Please attach & tick (✓) ☐ Cancelled 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*** (*11 character code) **MICR 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)

BAJAJ FINSERV ASSET MANAGEMENT LIMITED

Version 01: 04-11-25

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 & 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 **OR** ☐ Declaration form for Opting out of Nomination