

REQUEST FOR CHANGE OF STATUS FROM MINOR TO MAJOR

To be filled in capital letters and in blue / black ink only.

1. Folio Number/s Date

2. Name of Minor now turned Major

Investment(s) was made in the above Folio when I was minor and the same was represented by Name of Guardian

As I have attained age of 18 years as on , I request to transfer all units in my name and remove the Guardian Name.

Also update the following details in your records for the above referred Folio.

3. General Information

Date of Birth PAN Tax Status : Resident Individual NRI (Repatriable) NRI (Non-Repatriable)

4. Contact Details :

Email ID : Mob.

Mailing Address : Please note that your address details will be updated as per your KYC records with CVL / KRA

Address Line 1

Address Line 2

City Pin Code State

5. Bank Account Details

Bank Name

Account No. A/c. Type (✓) SB Current NRO NRE FCNR

BranchAddress Branch City

PIN IFSC Code 9 Digit MICR Code*

Please ensure the name in this application form and in your bank account are the same. Please update your IFSC and MICR Code in order to get payouts via electronic mode in to your bank account.

6. Nomination Details. I wish to Nominate Yes No

Nominee Name & Address	PAN of Nominee (Optional)	Date of Birth of Nominee	Nominee Relation With Investor	Guardian Name (in case Nominee is Minor)	Guardian Relation with Nominee	Allocation (%)	Sign of Nominee	Sign of Guardian	Signature of Applicants
									1st Applicant
									2nd Applicant
									3rd Applicant

7. FATCA and CRS DETAILS

Please indicate all Countries in which you are a resident for tax purpose, associated Taxpayer Identification Number and it's Identification type eg. TIN etc.

Are you a tax resident (i.e., are you assessed for Tax) in any other country outside India? Yes No

If 'No', please proceed for the signature of declaration. If 'Yes', please fill for All countries (other than India) in which you are a Resident for a Resident for tax purpose

i.e., where you are a Citizen / Resident / Green Card Holder / Tax Resident in the respective countries

Sole/Applicant/Guardian	Country [#]	Tax Payer Ref. ID No [§]	Identification Type	Country of Birth [^] **	Country of Nationality [^] **

[^]Mandatory for all type of Investors. It is mandatory for investors to be KYC compliant prior to investing in quant Mutual Fund. In case Country of Tax Residence is only India then details of Country of Birth & Nationality need not be provided. [§]In case Tax Identification Number is not available, kindly provide its functional equivalent

8. Documents to be submitted

Cancelled Original Cheque / Photocopy of Cheque Leaf* of the bank account (bearing preprinted account number and first unit holder name on the face of the cheque)

PAN copy KYC copy Age Proof - Birth Certificate / School Leaving Certificate / Mark Sheet issued by Higher Secondary School of respective States, ICSE, CBSE, etc. /

Passport of the Major / Any other suitable proof issued by Government Authorities.

* In case the investor submits the photocopy of the cheque leaf then Original cheque leaf should be produced for immediate verification.

9. Declaration and Signature

I/We hereby declare that the above information is given by the undersigned and the particulars given by me / us are correct and complete. I / We hereby submit the documents mentioned on following page, based on Minor Attains Major case as applicable to me/us. I/We will not hold the Fund/AMC/RTA for any delay in Minor Attains Major due to inadequacy of the documents or due to verification of any details and agree that the Fund reserves a right to call for any additional details and/or documents.

Signature of First Holder (Major)* Name	Guardian's Attestation* Registered Guardian's Name	Bank Manager Attestation* Branch Seal with attester's name and employee & No.
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Instructions

- You have to produce the originals of the documents mentioned above, along with the photocopies, at the counter, we shall verify them and return the originals to you, or photocopies can be submitted attested by the Banker/Manager, (name, designation, employee code, and seal should be affixed, clearly on the copy).
- Address shall be updated in the folio as per the records in CVL.
- Request for change of status should be submitted prior to the submission of any request of processing any financial transaction. If a combined request to change the status along with request to process any financial transaction is submitted, then only change in status request will be processed and such other request will be liable to be rejected.
- In case of systematic transactions like Systematic Investment Plan (SIP), Systematic Transfer Plan (STP) Systematic Withdrawal Plan (SWP) etc, the standing instruction for execution of such SIP, STP & SWP shall be terminated within 30 days from the date of receiving the request to change the status of the folio from Minor to Major

Acknowledgement Slip

Received, subject to verification, from _____ request for change of status from Minor to Major for Folio No : _____ as per details given above.

Signature, Date & Stamp