

**Request for change in status from Minor to Major**
**To  
The Trustees**

Tata Mutual Fund

**Name of the Applicant** (unit holder who is requesting for change of status from **MINOR** to **MAJOR**)

Mr./Ms

Date of Birth

PAN

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

☐ KYC Acknowledgment attached ☐ KYC form attached ☐ C-KYC Identification No.

Please tick/ whichever is applicable

Name of the Guardian

Mr./Ms

Relationship with the applicant: ☐ 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)	(4)	(7)
(2)	(5)	(8)
(3)	(6)	(9)

**Contact details of the Applicant**

Mobile No.+91

Tel.No. STD

Email Address:

**Address of the Applicant**

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)

**Bank Account Details of the Applicant**

Bank Name:

Account No: 11-digit IFSC

A/c. Type ☐ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR 9-digit MICR No.

Name of bank branch:

City: PIN

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

**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 1Lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ 25 Lacs-1crore ☐ >1 crore

**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

**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. (Recommended)

☐ **I DO NOT** wish to make a nomination (Please tick ✓ if you do not wish to nominate anyone)

**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 Tata Mutual Fund \_\_\_\_\_ 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 Tata Mutual Fund \_\_\_\_\_ Mutual Fund and its AMC/RTA to share/discard 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 \_\_\_\_\_

Signature of Applicant

Date DD - MMM - YYYY

\_\_\_\_\_

Name of the Guardian / Stamp of the Notary/JMFC

The above signature of the applicant duly attested by  
\_\_\_\_\_ Signature

**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)@**

@ 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