

CHANGE IN STATUS FORM (RESIDENT / NON RESIDENT)

For existing unitholders holding units in physical mode. The relevant section to be filled-in are indicated in the title of respective section. Please fill in the information below in English and in BLOCK Letters

IMPORTANT: Please strike off the unused section(s) to prevent any unauthorised use

Date:

A. UNIT HOLDER'S INFORMATION (Mandatory)

Folio No(s). PAN No.

Sole/1st Applicant

☐ Self attested copy of PAN

B. CHANGE IN STATUS

☐ RI to NRI

☐ NRI to RI

C. OVERSEAS ADDRESS (in case of RI to NRI) - Mandatory

Address

City

State PIN Country

D. CHANGE OF BANK MANDATE/MODE OF PAYMENT

	Existing Bank Details	New Bank Details
Name of the Bank	<input type="text"/>	<input type="text"/>
Branch	<input type="text"/>	<input type="text"/>
Account Number	<input type="text"/>	<input type="text"/>
Account Type	<input type="checkbox"/> Saving <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO	<input type="checkbox"/> Saving <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO
MICR (9 Digit)	<input type="text"/>	<input type="text"/>
IFSC Code (11 Character)	<input type="text"/>	<input type="text"/>
Branch Address	<input type="text"/>	<input type="text"/>
Branch City	<input type="text"/>	<input type="text"/>
Branch Pincode	<input type="text"/>	<input type="text"/>
	Date of opening of account	<input type="text"/>
Copy of Passport (1st & Last Page) <input type="checkbox"/>	Supporting proof attached	<input type="text"/>

COPIES/ORIGINAL DOCUMENTS REQUIREMENTS (Any one - Please tick the relevant box)

Old Bank Proof (for bank account currently registered in the folio)*	NEW BANK PROOF (For new bank account to be registered in the folio)
<input type="checkbox"/> Cancelled original cheque leaf** <input type="checkbox"/> Copy of Bank Pass Book or Bank Statement containing name and account number of unit holder* <input type="checkbox"/> Letter from Bank stating the account number and name of the holder/s <input type="checkbox"/> Any operative Bank Account Statement of 2 years (Should be held for a period of more than 2 years), where the address of the Bank Account should match with the registered address. If the address is different, an additional document towards proof of the address (acceptable as per the list of address proof) for this address in to be given <input type="checkbox"/> SOA is issued at least 2 years old under the same folio having registered bank account details printed on the same	<input type="checkbox"/> Cancelled original cheque leaf** <input type="checkbox"/> Copy of Bank Passbook or Bank Statement containing name and account number of unit holder* <input type="checkbox"/> Letter from Bank stating the account number and name of the holder/s

* In case the bank account is already closed, a duly signed and stamped original letter from such bank on the letterhead of bank, confirming closure of said account

**Cheque leaf with printed account number and name of 1st Unit Holder to be submitted

* Bank Statement copy should be verified with original by the UFC and should contain signature of the bank official and bank seal as authentication.

E. NEW CONTACT DETAILS

Mobile : +91

Email :

Applicant Declaration

I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that I may be held liable for it. I hereby declare that I am not making this application for the purpose of contravention of any Act, Rules, Regulations or any statute of legislation or any notifications/directions issued by any governmental or statutory authority from time to time.

SIGNATURE OF SOLE / FIRST APPLICANT	SIGNATURE OF SECOND APPLICANT	SIGNATURE OF THIRD APPLICANT
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Acknowledgement for Change in Status (Resident / Non Resident) Form (to be filled by the unit holder)

from Mr/ Mrs/ Ms :

Folio No :

Receiving UFC/Registrar's official stamp with date and signature

Registrar: KFin Technologies Private Limited, Unit : UTI Mutual Fund, Selenium Tower B, Plot No. 31 & 32, Financial District, Nanakramguda, Serilingampally Mandal, Hyderabad - 500032, India Ph: 040-67162222, Email: uti@kfintech.com

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.