

Request for change in status from Minor to Major



Form MAM

To:
The Trustees,
HDFC Mutual Fund

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

Mr./Ms.																											
Date of Birth	D	D	M	M	Y	Y	Y	Y	PAN																		
Tax Status	<input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI <input type="checkbox"/> PIO <input type="checkbox"/> Others <small>(please specify)</small>																										
<input type="checkbox"/> KYC Acknowledgment attached <input type="checkbox"/> KYC form attached <input type="checkbox"/> C-KYC Identification No. Please tick ✓ whichever is applicable																											

Name of the Guardian

Mr./Ms.																											
Relationship with the applicant:	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> 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):-																											
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Contact details of the Applicant

Mobile No. +91											Tel. No.	STD -															
Email Address																											
This mobile number belongs to (Mandatory Please ✓): <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Children <input type="checkbox"/> Dependent Siblings <input type="checkbox"/> Dependent Parents <input type="checkbox"/> Guardian <input type="checkbox"/> POA <input type="checkbox"/> Custodian (for FPIs only) <input type="checkbox"/> PMS																											
This email id belongs to (Mandatory Please ✓): <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Children <input type="checkbox"/> Dependent Siblings <input type="checkbox"/> Dependent Parents <input type="checkbox"/> Guardian <input type="checkbox"/> POA <input type="checkbox"/> Custodian (for FPIs only) <input type="checkbox"/> PMS																											

Bank Account Details of the Applicant

Bank Name																											
Account number											11-Digit IFSC																
A/C type	<input type="checkbox"/> SB <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRE <input type="checkbox"/> FCNR <input type="checkbox"/> 9-Digit MICR No.																										
Name of bank branch																											
City																					Pin						
Please attach & tick ✓ <input type="checkbox"/> Cancelled cheque with applicant's name printed OR <input type="checkbox"/> Applicant's Bank Statement/Passbook																											

Additional KYC information (Please tick ✓ whichever is applicable)

Occupation	<input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Home Maker <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others <small>(Please specify)</small>																										
The applicant is	<input type="checkbox"/> a Politically Exposed Person <input type="checkbox"/> Related to a Politically Exposed Person <input type="checkbox"/> Neither (Not applicable)																										
Gross Annual Income (Rs.)	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> 25 Lacs-1crore <input type="checkbox"/> >1 crore																										

FATCA and CRS information

Country of Birth											Place of Birth																		
Nationality																													
Are you a tax resident of any country other than India? <input type="checkbox"/> Yes <input type="checkbox"/> 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							

ACKNOWLEDGEMENT SLIP (To be filled in by the Investor) [For any queries please contact our nearest Investor Service Centre or call us at our Customer Service Number 1800 3010 6767 / 1800 419 7676 (Toll Free)]

HDFC MUTUAL FUND

Date : Head Office : HDFC House, 2nd Floor, H.T. Parekh Marg, 165-166, Backbay Reclamation, Churchgate, Mumbai - 400 020.

Received from Mr. / Ms. / M/s. _____

[For any queries please contact our nearest Investor Service Centre or call us at our Customer Service Number 1800 3010 6767 / 1800 419 7676 (Toll Free)]

e-mail us at: hello@hdfcfund.com or visit our website: www.hdfcfund.com Missed Call Number - +91 85069 36767

ISC Stamp & Signature

Nomination	
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☐ I/We wish to make a nomination. [As per details given below]

☐ I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the implications / issues involved in non-appointment of any nominee(s) and am/ are further aware that in case of my demise / death of all the unit holders in the folio, my / our legal heir(s) would need to submit all the requisite documents issued by the Court or such other competent authority, as may be required by the Mutual Fund / AMC for settlement of death claim / transmission of units in favour of the legal heir(s), based on the value of the units held in the mutual fund folio/s.

I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my / our account/ folio in the event of my / our demise, as trustee and on behalf of my/ our legal heir(s)*. This nomination shall supersede any prior nomination made by us/me if any.

Nomination can be made upto three nominees in the account.

Details of 1st Nominee

Details of 2nd Nominee

Details of 3rd Nominee

Mandatory information

1	Name of the nominee(s) (Mr./Ms.)
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%

%

%

3	Date of Birth (for Minor)
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D	D	M	M	Y	Y	Y	Y
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D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

4	Relationship with the Applicant (select one)
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☐ Spouse ☐ Father ☐ Mother
☐ Daughter ☐ Son
 Others (please specify)

☐ Spouse ☐ Father ☐ Mother
☐ Daughter ☐ Son
 Others (please specify)

☐ Spouse ☐ Father ☐ Mother
☐ Daughter ☐ Son
 Others (please specify)

5	Nominee/ Guardian (in case of Minor) Identification details <i>[Please tick any one of the following and provide ID Number and no copies required]</i> .
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☐ PAN

☐ Aadhaar (masked last 4 digits)

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☐ Passport (for NRIs/OCIs/PIOs)

☐ Driving License

☐ PAN

☐ Aadhaar (masked last 4 digits)
**** *

☐ Passport (for NRIs/OCIs/PIOs)

☐ Driving License

☐ PAN

☐ Aadhaar (masked last 4 digits
**** *)

☐ Passport (for NRIs/OCIs/PIOs)

☐ Driving License

6	Address of Nominee(s)/ Guardian in case of Minor
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City / Place:
State & CountryPincode:

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Pincode:

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Pincode:

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7	Mobile of nominee(s)/ Guardian in case of Minor
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8	Email ID of nominee(s)/ Guardian in case of Minor
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Non-mandatory details

9	Nominee Guardian Name (in case Nominee is Minor)
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I / We want the details of my / our nominee to be printed in the statement of holding or statement of account, provided to me/ us by the AMC / DP as follows: (please tick, as appropriate)

☐ Name of nominee(s) with % ☐ Nomination: Yes / No (Default)

This nomination shall supersede any prior nomination made by the account holder(s), if any

Nomination (Contd...)		
Signature(s) – As per mode of holding in demat accounts / MF Folio(s).		
	Name of the Holder	Signature / Thumb Impression
Sole / First Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
Second Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
Third Holder (Mr./Ms.)	Name: Witness 1 Name & Address: Witness 2 Name & Address:	Signature /Thumb Impression: Witness 1 Signature: Witness 2 Signature:
* Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature. # Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form.		
Note: The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)		

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 _____ 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 _____ 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

<p>Place: _____</p> <p>Date: <table border="1" style="display: inline-table; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px; text-align: center;">D</td><td style="width: 20px; height: 20px; text-align: center;">D</td><td style="width: 20px; height: 20px; text-align: center;">M</td><td style="width: 20px; height: 20px; text-align: center;">M</td><td style="width: 20px; height: 20px; text-align: center;">Y</td><td style="width: 20px; height: 20px; text-align: center;">Y</td><td style="width: 20px; height: 20px; text-align: center;">Y</td><td style="width: 20px; height: 20px; text-align: center;">Y</td></tr></table></p>	D	D	M	M	Y	Y	Y	Y	<p>Signature of Applicant</p>
D	D	M	M	Y	Y	Y	Y		

(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

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