APPLICATION FORM FOR TAX STATUS CHANGE



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 out the Section(s) that is/are not used by you to avoid any unauthorised use **UNITHOLDER'S INFORMATION (Mandatory)** Folio No(s). PAN Sole/1st Applicant **CHANGE IN TAX STATUS** Resident Indian (Individual) To NRI - Non-Repatriable (NRO) NRI - Non-Repatriable (NRO) To Resident Indian (Individual) NRI - Repatriable (NRE) To Resident Indian (Individual) NRI - Repatriable (NRE) To NRI - Non-Repatriable (NRO) (Note - Resident Indian (Individual) to NRI-Repatriable (NRE) & NRI-Non Repatriable (NRO) to NRI-Repatriable (NRE) not allowed) For existing SIP please attach the following: OTM Modification Form USA/Canada Declaration (only applicable to NRI from USA and Canada) OVERSEAS ADDRESS (in case of RI to NRI) - Mandatory Address _____ PIN _ State _ __ Country _ **NEW BANK MANDATE/MODE OF PAYMENT** Not required if the bank accounts details are same **Old Bank details Bank Name Bank Account Number** NRE NR₀ **FCNR** Other Savings Current **Account Type Bank Address** City **PIN Code** IFSC Code (11 digit) MICR Code (9 digit) **New Bank details Bank Name Bank Account Number Account Type** Savings Current NRE **FCNR** Other **Bank Address** City **PIN Code** IFSC Code (11 digit) MICR Code (9 digit) Documents to be submitted by investor Existing bank details (Any one of the following) New bank details (Any one of the following) A cancelled original cheque leaf/Self attested copy of cancelled A cancelled original cheque leaf/Self attested copy of cancelled cheque* cheque* Photocopy of bank passbook or bank account statement (Having Photocopy of bank passbook or bank account statement (Having entries not older than 3 months) entries not older than 3 months) Letter from the bank should be on the letter head of the bank with Letter from the bank should be on the letter head of the bank with employee name, code and designation of the banker (mandatorily). employee name, code and designation of the banker (mandatorily). *Account number and name of the first unit holder should be printed on the face of the cheque **NEW CONTACT DETAILS** Mobile No. **Email ID** Email address Mobile No. specified above belongs to self or family, due to investor being (Please (\checkmark) any one option from below) Self Spouse Guardian (for Minor investment) Dependent Children Dependent Parents Dependent Siblings POA PMS Custodian ACKNOWLEDGEMENT SLIP FOR Tax Status Change Form (To be filled in by the Investor) Updation will be subject to Validations HDFC MUTUAL FUND: Head Office: HDFC House, 2nd Floor, H.T. Parekh Marg, 165-166, Backbay Reclamation, Churchgate, Mumbai - 400 020. D D M M Y Y Y FOLIO NO. ISC Stamp & Signature Received from Mr. / Ms. [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)] visit our website: www.hdfcfund.com e-mail us at: hello@hdfcfund.com or (f) Missed Call Number - +91 85069 36767

FATCA & CRS DETAILS							
Place of Birth			Country of Birth				
Are you a tax resident (i.e. a in any other country outside	,	Yes No	(Please tick (✓) a	ny) If "NO" proceed	for the signat	ure of declaratio	n
If "YES" please fill for ALL c Resident in the respective c		in which you are a Re	sident for tax purpos	se i.e. where you are a Ci	tizen Resident	/ Green Card Hol	der/ Tax
Country of Tax Residency	Tax Identification Number	or Function Equivalent	Identification Type (1	TIN or other please specify	If TIN is not a	available please tic	k the reason
					☐ A	В	C
Reason A The country w	here the Account Holder is	liable to pay tax does n	ot issue Tax Identifica	ation Numbers to its reside	ents.		
Reason B No TIN require	ed (Select this reason Only i	f the authorities of the r	espective country of	tax residence do not requi	re the TIN to be	e collected)	
Reason C Others, please	state the reason thereof: _						
KYC DETAILS Occupation Private Sec	ctor Service Public S	Sector Service G	overnment Service	☐ Business ☐ Pro	ofessional [Agriculturist	Retired
Housewife			roprietorship	Forex Dealer Otl	_	_ ~	nemec
_	Below 1 lac 1-5		· _ ·			- /	
	cally Exposed Person (PEP)		to Politically Exposed		ot Applicable	· Ci	
DECLARATION AND SIGNAT	, ,		Expoora				
I/We have read and understo Scheme(s) and agree to abid here by agree to abide by the Central Board of Direct Taxes of trail commission or any o being recommended to me/u: I/We hereby confirm that I/we I/We hereby declare and conf case of non submission of an AMC/Alternative Investment f	ood the contents of the Sc de by the terms, conditions provisions under Foreign A notified Rules 114 F to 11- ther mode), payable to him s. e have not been offered/ con firm that the information pro- ny of the documents or if the	rules and regulations of count Tax Compliance 4H, as part of the Incomplet for the different complements are not for the documents are not for the documents are not for the country and the documents are not for the country	of the Scheme(s) as Act (FATCA) and Co ne-tax Rules, 1962. The peting Schemes of va- cive portfolio and/or a ue and correct and is pund to be in order, the	on the date of this transace mmon Reporting Standard ne ARN holder has disclos arious Alternative Investment, and indicative yield for this duly supported by the done AMC reserves the right	ction. I/We have ds (CRS) under ed to me/us all ent fund from a investment. cument proof e to not register	e further read, un FATCA & CRS pr I the commission amongst which the enclosed alongwit	nderstood and rovision of the s (in the form he Scheme is the form. In
First/ Sole Unit hold	er/ Guardian/ POA Holder		Second Unit holder	n the Application Form a		rd Unit holder	

Please note: Signature(s) should be as it appears in the folio/ on the Application Form and in the same order.
In case the mode of holding is joint, all Unit holders are required to sign.