

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	☐ 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):-																											
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Contact details of the Applicant

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

Bank Account Details of the Applicant

Bank Name																											
Account number											11-Digit IFSC																
A/C type	☐ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR ☐ 9-Digit MICR No.																										
Name of bank branch																											
City																					Pin						
Please attach & tick ✓ ☐ Cancelled 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 (Rs.) ☐ Below 1 Lac ☐ 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							

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 Details

- ☐ I/We wish to make a nomination.
[As per details given below]
- OR ☐ I hereby confirm that I do not wish to appoint any nominee(s) to my mutual fund folio at this point of time.
I understand that –
- (i) the nomination helps to quickly identify the person for transfer of securities and helps in faster and smoother transmission of my securities to my legal heir(s) after my demise.
 - (ii) in the absence of a nomination, my legal heir(s) may require the submission of certain additional legal or court-issued documents which may delay the process of transmission of securities to my legal heir(s).
 - (iii) if no claim is made on the account / folio for a prolonged period after my demise, the holdings may be treated as unclaimed assets, and they may be transferred to Investor Education and protection Fund Authority (IEPF) in accordance with the applicable regulatory framework.
- I confirm that I have understood the above implications and that my decision to opt out of nomination is voluntary.

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 folio / account in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any.

1. Mandatory Details

S. No.	Details	1st Nominee	2nd Nominee	3rd Nominee
1	Name of the nominee(s) (Mr./Ms.)			
2	Relationship with the Applicant (Select one)	☐ Spouse ☐ Mother ☐ Father ☐ Daughter ☐ Son ☐ Others _____ (Please specify)	☐ Spouse ☐ Mother ☐ Father ☐ Daughter ☐ Son ☐ Others _____ (Please specify)	☐ Spouse ☐ Mother ☐ Father ☐ Daughter ☐ Son ☐ Others _____ (Please specify)
3	Date of Birth (For Minor)	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y

2. I want the following nomination details to be printed in the account / holding statements (tick one of the boxes below):

- ☐ Name of the Nominee(s)
- ☐ Whether nomination given: Yes / No (Default)

3. A. Optional details of nomination:

S. No.	Information	1st Nominee	2nd Nominee	3rd Nominee
a)	% Share of nominee** (equal share if % is not specified)	_____ %	_____ %	_____ %
b)	Mobile of nominee***			
c)	Email ID of nominee***			
d)	Specify Personal identifier document	☐ 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 _____	☐ PAN _____ ☐ Aadhaar (masked last 4 digits) _____ **** * ☐ Passport (for NRIs/OCIs/PIOs) _____ ☐ Driving license _____
e)	Guardian Name (in case Nominee is Minor)			

**Any odd lot after division shall be transferred to the first nominee mentioned in the form.

*** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.

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

Signature(s) - As per mode of holding in MF Folio(s)

Name(s) of holder(s)	Signature(s) of holder****
Sole / First Holder ☐ Mr. ☐ Ms.	
Second Holder ☐ Mr. ☐ Ms.	
Third Holder ☐ Mr. ☐ Ms.	

****If nomination is submitted:

Wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses shall be duly provided in this form.

Nomination (Contd...)

Name(s) of holder(s)	Thumb Impression	Witness Name & Address	Witness Signature
Sole / First Holder ☐ Mr. ☐ Ms.			
Second Holder ☐ Mr. ☐ Ms.			
Third Holder ☐ Mr. ☐ Ms.			

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 _____ 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/disclose 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: <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>		D	D	M	M	Y	Y	Y
D	D	M	M	Y	Y	Y	Y	

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) @

Name of the Guardian / Stamp of the Notary/JMFC	The above signature of the applicant duly attested by me
	Signature

@ 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