

To be filled in Capital Letters.

## CHANGE IN STATUS – MINOR ATTAINING MAJORITY

<b>Folio/Account Number</b>	
-----------------------------	--

Investment was made in the above mentioned folio(s) by \_\_\_\_\_ *Name of Guardian as in the Folio(s)* \_\_\_\_\_. I request you to transfer all units in my name as I \_\_\_\_\_ *Name of Minor* \_\_\_\_\_ have attained age of 18 years as on date. Also update the details as follows :

<b>Date of Birth</b>	
<b>PAN of the Unitholder</b>	

### Change of Address as per KRA

Please note that your address details will be updated as per your KYC records with CVL / KRA. In case the above-mentioned PAN(s) is/are not verified by KYC Registration Agency (KRA), kindly visit nearest Point of Service of KRA and submit the [KYC Form](#) along with relevant documentary proof. For more information in this regard please read "INSTRUCTIONS / CHECK LIST FOR FILLING KYC FORM" detailed on the reversed side of the KYC form.

### Change/Updation of Bank Details

<b>Bank Account Number #</b>			
<b>Bank Account Type (Please ✓)</b>	<input type="checkbox"/> Savings	<input type="checkbox"/> Current	<input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> FCNR <input type="checkbox"/> Others (Please specify) .....
<b>Bank Name and Branch</b>			
<b>RTGS/IFSC/NEFT Code</b>	11 digit code is printed on the cheque book	<b>MICR Code</b>	9 Digit Number next to the Cheque No.

### FATCA-CRS Declaration & Supplementary Information (Mandatory)

<b>City &amp; Country of Birth</b>	<b>Gender</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
Are you a tax resident of any country other than India? <input type="checkbox"/> Yes <input type="checkbox"/> No (If yes, fill and attach FATCA & CRS individual Form)		
<b>Income Slab</b>	<input type="checkbox"/> <1 Lacs <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> 25Lac-1 Crore <input type="checkbox"/> > 1 Crs	
<b>Type of Address given at KRA</b>	<input type="checkbox"/> Residential <input type="checkbox"/> Business <input type="checkbox"/> Registered Office	
I hereby confirm that the information provided here in above is true, correct and complete to the best of my knowledge and belief and that I shall be solely liable and responsible for the information submitted above. I also confirm that I have read understood the FATCA & CRS Terms and Conditions below and hereby accept the same. I also undertake to keep you informed in writing about any changes / modification to the above information in future within 30 days of the same being effective and also undertake to provide any other additional information as may be required any intermediary or by domestic or overseas regulators / tax authorities.		

All other details vis-à-vis the referred Folio(s), as on the records of the AMC/Registrar shall be considered accurate and complete, unless otherwise appropriately/suitably communicated by the unit holder.

#### Mandatory Documents to be submitted along with, in respect of minor unitholder having attained majority:

<input type="checkbox"/>	Self-attested copy of PAN Card
<input type="checkbox"/>	KYC Acknowledgement issued by KYC Registration Agency (KRA). In case the above-mentioned PAN(s) is/are not verified by KYC Registration Agency (KRA), kindly visit nearest Point of Service of KRA and submit the <a href="#">KYC Form</a> along with relevant documentary proof. For more information in this regard please read "INSTRUCTIONS / CHECK LIST FOR FILLING KYC FORM" detailed on the reversed side of the KYC form.
<input type="checkbox"/>	Proof of Age - Date of birth of the minor should be mentioned on the request. (anyone) <ul style="list-style-type: none"> <li><input type="checkbox"/> Birth certificate of the minor</li> <li><input type="checkbox"/> Any other suitable proof evidencing the relationship</li> <li><input type="checkbox"/> Passport of the minor</li> <li><input type="checkbox"/> School leaving certificate / mark sheet of Higher Secondary Board of respective states, ICSE, CBSE etc.</li> </ul>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• the parent/guardian whose signature is registered in our records against the above-mentioned folio of the minor unitholder; <b>OR</b></li> <li>• Confirmation of Bank Details with signature attestation by a bank branch manager with the bank stamp, Signatory Full Name, Designation and Employee Code.</li> </ul>

#### Please provide contact Details, to help us serve you better.

<b>E-mail address</b>						
<b>Mobile No.</b>		<b>STD Code</b>		<b>Residence Tel. No.</b>		<b>Office Tel. No.</b>

Please enclose the relevant documentary proof duly attested as listed in the instructions. The request is liable to be rejected if any information is missing or incorrectly filled or signature mismatch or there is deficiency in the documents submitted.

<b>Signature of the Unitholder (having attained majority)</b>	<b>Registered Signature of the Parent/Guardian</b>

(This request can be submit at our nearest Investor Service Location. The list of Point of Official Point of Acceptance / Investor Service Centres are available on our website – <https://www.principalindia.com/contact>)