Minor Attains Majority: Request Form to Update Details

Folio Number

Mandatory documents:

Proof of new Bank account details

TOLL FREE NUMBER: 1800 3000 3060 | EMAIL: clientservice@yesamc.in | WEBSITE: www.yesamc.in



ISC Stamp & Signature

The minor in whose name investments were done is a Major now!! ARN-4464 E032737 VIKRAM S. BAGADTHEY Time to update details in the folio. Fill this form, attach documents and submit to us. All details and documents in the form are mandatory. 1. Folio No/s: 2. Minor's Name in the folio: 3. Guardian's Name in the folio: Having completed age of 18 years, the erstwhile minor has become a major. I request YES Mutual Fund to transfer the Units in the name of the Major Unit holder independently, with details as mentioned below. FHereunder, please mention details of erstwhile minor who has turned Major now. 4. Date of Birth: 6. Tax Status Resident Individual NRI (Non-Repatriable) 7. Additional KYC Details a. Occupation Details (Please tick) Private Sector Service ☐ Public Sector Service Business □ Government Service Others ☐ Professional ☐ Agriculturist Retired Student Forex Dealer Housewife ☐ Below 1 Lac ☐ 1-5 Lacs ☐ 5-10 Lacs 10-25 Lacs 25 Lacs-1 crore ☐ >1 crore b. Gross Annual Income c. Others (Please tick /) Politically Exposed Person (PEP) ■ Not Applicable Related to a Politically Exposed Person (PEP) 8. Contact Details Email id: (in capital) Mobile Number: +91 9. New Address New address to be updated from KYC letter attached. Or provide below if KYC is still in progress. Address 1 Address 2 City State Pin Code Cancelled Cheque with name & account number pre-printed OR Bank statement OR Certified Copy of Pass book (Photocopy if submitted should be attested by the Bank or originals should be produced for verification.) Bank Name A/c Number Branch & City MICR Code IFSC Code □ NRO A/c Type (Please ✓) ☐ Savings Current ☐ NRE FCNR Other (11. FATCA and CRS Details of the Account Holder (Mandatory) Place & Country of Birth: Place Country # Please indicate all Countries, other than India, in which you are a resident for tax purpose, associated Taxpayer Identification Number and it's Identification type eg. TIN etc. Country # Identification Type Tax Identification Number 2. 3. ☐ I wish to nominate. ■ I DO NOT wish to nominate. (Advisable to avail Nomination Facility) Nominee Name Guardian Name (if minor) Nominee Date of Birth Address: Landmark 13. Guardian Signature OR Banker's Attestation/Attach bank letter for bank acco 13. Signature of Unit holder (Erstwhile Minor, now Ma Name: Guardian's Signature Banker's Attestation Signature: Acknowledgement (To be filled in by the investor) **Minor Attains Majority** Received, subject to verification, request for change of status from minor to major

Declaration in attached form

- 1) I/We am/are not prohibited from accessing capital markets under any order/ruling/judgment etc., of any regulation, including SEBI. I/We have read and understood the information requirements and the Terms and Conditions mentioned in this Request Form [including Foreign Account Tax Compliance Act ("FATCA") and Common Reporting Standards ("CRS") instructions] and hereby confirm and declare that, the information provided by me/us in this Request Form is true, correct and complete and is duly supported by the documentary evidence / proof enclosed along with the Request Form. Further I/We hereby agree and undertake to intimate / inform promptly the AMC/ Fund/ Trustee/ RTA, of any modification to the above mentioned information. I/We further agree to abide by all the Terms and Conditions and the Provisions of the Scheme related document/(s).
- 2) For Foreign Nationals Resident in India only: I/We will redeem my/our entire investment/s before I/We change my/our Indian residency status. I/We shall be fully liable for all consequences (including taxation) arising out of the failure to redeem on account of change in residential status.
- 3) For NRIs/PIO/OCIs only: I/We confirm that my application is in compliance with applicable Indian and foreign laws.

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