

**IIFL**
ASSET MANAGEMENTARN-4464 E032737 VIKRAM S. BAGADTHEY
Request for update of 'Minor attaining Majority' Status

Folio No.(s)

Investor Name

This has the reference to my/our investments in the captioned folio(s) in your Fund made when I was minor and same was represented by _____ (Guardian Name). As I have attained age of 18 years as on _____, I request you to change my status in the folio and remove the guardian name and also update the following details in your records for the above mentioned Folio:

Investor Details

PAN / PEKRN

Nationality

Date of Birth

DD - MM - YYYY

KYC Compliance

 Proof attached

E-mail

Mobile No.

Telephone (Res.)

Telephone (Off.)

Communication Address: (New Address to be updated from KYC letter attached or provide below if KYC is still in progress.)

Address line 1

Address line 2

City

Pin Code

State

BANK ACCOUNT DETAILS OF THE FIRST / SOLE APPLICANT (The bank account details provided below will be held on record and considered as default bank mandate to pay redemption proceeds and dividend payouts) (if applicable)**NOTE:** Please attach documentary proof as listed overleaf.

Bank Name

Branch Name

Bank Account No.

Bank City

MICR

IFSC

Bank Account Type

 Savings Current NRI-NRO NRI-NRE FCNR Others *please specify***NOMINATION DETAILS****[Please (✓) and sign]** I/We do not wish to Nominate

Sole Applicant

OR

 I/We wish to nominate as under:

Name and Address of Nominee(s)	Relationship with Applicant	Date of Birth	Name and Address of Guardian	Signature of Nominee (Optional)/ Guardian of Nominee (Mandatory)	Proportion (%) in which the units will be shared by each Nominee (should aggregate to 100%)
		(to be furnished in case the Nominee is a minor)			

ADDITIONAL KYC INFORMATION (Mandatory)**a. Status of First/ Sole Applicant [Please tick (✓)]** Individual Resident Individual NRI-Repatriation NRI-Non Repatriation PIO Foreign National Resident in India FPI Others _____**b. Occupation Details [Please tick (✓)]** Service Private Sector Public Sector Government Service Student Professional Housewife Business Retired Agriculture Proprietorship Others _____ (Please specify)**c. Gross Annual Income (Rs.) [Please tick (✓)]** Below 1 Lac 1 - 5 Lacs 5 - 10 Lacs 10 - 25 Lacs >25 Lacs - 1 Crore >1 Crore **OR****c. Net-worth** (Mandatory for Non-Individuals) Rs. _____ as on _____ (Not older than 1 year)**d. Politically Exposed Person (PEP) Status [Please tick (✓)]** I am PEP I am Related to PEP Not Applicable

FATCA & CRS INFORMATION

The below information is required for all applicant(s)/ guardian

Address Type: Residential or Business Residential Business Registered Office (for address mentioned in form/existing address appearing in Folio)

Is the applicant(s)/ guardian's Country of Birth / Citizenship / Nationality / Tax Residency other than India? Yes No

If Yes, please provide the following information [mandatory]

Please indicate all countries in which you are resident for tax purposes and the associated Tax Reference Numbers below

Category	Unit Holder
Place/ City of Birth	
Country of Birth	
Country of Tax Residency#	
Tax Payer Ref. ID No [^]	
Identification Type [TIN or other, please specify]	
Country of Tax Residency 2	
Tax Payer Ref. ID No. 2	
Identification Type [TIN or other, please specify]	
Country of Tax Residency 3	
Tax Payer Ref. ID No. 3	
Identification Type [TIN or other, please specify]	

#To also include USA, where the individual is a citizen/ green card holder of USA. [^]In case Tax Identification Number is not available, kindly provide its functional equivalent.

DECLARATION & SIGNATURE

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. Please () Yes No If Yes, () Repatriation basis Non-repatriation basis

Specimen signature of the Unit holder who has attained Majority:

In support of my current signature:

I am submitting this request during a personal visit to your Investor Service Centre along with my original PAN / Passport

OR

Parent / Guardian (registered in the folio) has attested here

Signature of parent / guardian

OR

SIGNATURE VERIFICATION BY BANK

Name of the bank official	Signature of bank official with Bank's seal
Name of the bank	
Bank Account Number	
Designation	
Employee Code	
Contact number	

FOR OFFICE USE ONLY

Attestation by AMC / CAMS official: I have verified the above signature against the PAN / Passport of the unit holder and the signature has been made in my presence

Name	Signature
Designation	
Employee Code	
HISC/CISC	

Mandatory Documents to be enclosed:

- KYC acknowledgement copy, date should be on or after completion of 18 years of age
- Age Proof - Birth Certificate / School Leaving certificate / Mark sheet Issued by higher Secondary School of respective states, ICSE, CBSE, etc. / Passport of the Minor / PAN card copy / Any other suitable proof issued by Government Authorities
- For the existing / new bank account
 - Cancelled Cheque with Name & Account number printed on it.
 - Copy of the Bank Pass book / Bank Statement showing A/c holder Name and A/c No., duly attested by the Bank Manager where the above mentioned bank account is maintained.

Note: The above documents should be either in original or copy to be submitted along with original shown for verification.