



Minor Attaining Majority

ARN-4464

E032737 VIKRAM S. BAGADTHEY

To,
Invesco Mutual Fund

Folio Number

Investment was made in the above Folio when I was minor and the same was represented by _____ (Guardian Name). As I have completed age of 18 years as on _____, I request to transfer all units in my name and remove the Guardian Name. Also update the following details in your records for the above referred Folio.

1. Applicant Details

CKYC (✓) KIN

PAN * Date of Birth

Mobile No. Email Id

Tel. (Res) Tel. (Office)

Gross Annual Income (✓) Below 1 Lac 1-5 Lacs (Default) 5-10 Lacs 10-25 Lacs 25 Lacs - 1 Crore > 1 Crore Net-worth in ₹ as on (Not older than 1 year) (Mandatory for Non-individuals)

Occupation Details (✓) Private Service Public Sector / Govt. Service Business Professional Housewife Retired Student Forex Dealer Agriculturist Others _____ (Please specify)

2. Others (✓)

For Individuals Politically Exposed Person Related to Politically Exposed Person Not Applicable

For Non-Individuals **Is the entity involved in any of the following services**
 (i) Foreign Exchange/Money Changer Services Yes No (ii) Gaming/Gambling/Lottery/Casino Services/Betting Syndicates Yes No
 (iii) Money Lending/Pawning Yes No

(Politically Exposed Persons (PEP) are defined as individuals who are or have been entrusted with prominent public functions in a foreign country e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/military officers, senior executives of state owned corporations, important political party officials etc.)

3. FATCA Declaration

Country of Birth /Citizenship/Nationality or Tax Residency, other than India, for any applicant: Yes No (Mandatory to ✓)
 If Yes, please fill FATCA/ CRS declaration

NRI investors should mandatorily fill separate FATCA/CRS declarations. Non-individuals investors should mandatorily fill separate FATCA / CRS & UBO declarations.

4. Bank Details

Bank Name* Branch

Bank City PIN

A/c No* A/c Type*

MICR Code (9 Digit) IFSC Code (11 Digit)

* Mandatory

Acknowledgement Slip

We acknowledge the receipt of the request for change of status from minor to major from Mr. / Ms. / M/s. _____

in Folio No. with Invesco Mutual Fund (Subject to scrutiny and verifications.)


Date of receipt at Karvy / AMC

Karvy / AMC Seal

5. Nomination Details (Mandatory for investors who opt to hold units in non-demat form)

	Name	Relationship																		
Nominee 1	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>																		
	Date of Birth (for minor)	Nominee PAN																		
	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <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	Y	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
D	D	M	M	Y	Y	Y	Y													
		% Share																		
		<input style="width: 95%;" type="text"/>																		
Nominee 2	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>																		
	Date of Birth (for minor)	Nominee PAN																		
	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <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	Y	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
D	D	M	M	Y	Y	Y	Y													
		% Share																		
		<input style="width: 95%;" type="text"/>																		
Nominee 3	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>																		
	Date of Birth (for minor)	Nominee PAN																		
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D	D	M	M	Y	Y	Y	Y													
		% Share																		
		<input style="width: 95%;" type="text"/>																		
	Name of Guardian (If Nominee is Minor)	Guardian's Relation (with the minor)																		
	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>																		
	Address	PAN of Guardian																		
	<input style="width: 95%; height: 40px;" type="text"/>	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																		

I do not intend to nominate (✓ the box , in case you do not wish to nominate)

<div style="border: 1px solid black; padding: 5px; width: 90%; margin: 0 auto;">  <p style="text-align: center;">Signature of First Holder (Major)</p> </div> <hr style="width: 90%; margin: 5px auto;"/> <p style="text-align: center;">(Name)</p>	<div style="border: 1px solid black; padding: 5px; width: 90%; margin: 0 auto;">  <p style="text-align: center;">Guardian's Attestation</p> </div> <hr style="width: 90%; margin: 5px auto;"/> <p style="text-align: center;">(Registered Guardian's Name)</p>	<p>Or</p> <div style="border: 1px solid black; padding: 5px; width: 90%; margin: 0 auto;">  <p style="text-align: center;">Bank Attestation</p> </div> <hr style="width: 90%; margin: 5px auto;"/> <p style="text-align: center;">(Branch Seal with Attester's Name and Employee Number)</p>
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Documents attached :

- New bank mandate where account changed from minor to major.
- Signature of the major should be attested by the Guardian on folio OR Manager of a scheduled bank / Bank Certificate/ Letter.
- KYC acknowledgement of the major.
- FATCA declaration of major.

Attach Any one of following :

- Cancelled cheque leaf for each of bank accounts to be registered (the name of bank account holder must be printed on the cheque leaf); or
- Copy of bank statement / pass book page showing account number, account holders' name and address, for each of bank account to be registered.

Please note:

(Originals of above documents should be produced for verification at the ISC or Official Points of Acceptance of Transactions of Invesco Mutual Fund and the original will be returned across the counter after verification.)

Get in Touch

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