

Request for Updation of Sole/First Holder Details

(To be used for minor unit holder on becoming major)



ARN-4464 E032737
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Please complete all sections in English. For legibility, please use BLOCK LETTERS in black or dark ink

APPLICANT INFORMATION

Name of Sole/1st Unit Holder (Minor) _____ First Name _____ Middle Name _____ Last Name _____ Folio No. | | | | | | | | |

Name of the Guardian (on the folio): _____

Dear Sir/Madam,

This is to inform you that I, _____ name of the minor on folio _____ have become major now. You are requested to update my following details in the folio.

A. IDENTITY DETAILS

Tax Status (please ✓) Resident Individual Non Resident Others _____

PAN (Unit Holder) | | | | | | | | | Please enclose a self attested copy of your PAN Card

B. CONTACT DETAILS

Mobile | | | | | | | | | Email ID _____

Tel. (Office) | | | | | | | | | Tel. (Res) (ISD) (STD) | | | | | | | | |

C. BANK ACCOUNT DETAILS

Account Number | | | | | | | | | | | | | | | | | | | | | |

Account Type (please ✓) Saving Current NRE NRO FCNR Others _____

Bank Name _____

Branch _____ City _____

IFSC | | | | | | | | | (11 character code. You should find it on your cheque leaf) MICR Code | | | | | | | | | (9-digit number next to your cheque no)

I/We wish to have the above bank account as my/our primary account for redemption/dividend pay outs (Please ✓)

Please submit original cancelled cheque wherein account holder's name and account number is printed on it.

KYC DETAILS (Mandatory. If left blank the application is liable to be rejected)

Gross Annual Income

Below 1 lac 1-5 Lacs 5-10 Lacs 10-25 Lacs 25 Lacs - 1 crore > 1 Crore

Net-worth in (₹) _____ as on | | | | / | | | | / | | | | | | | | (Not older than 1 year)

Occupation Details (For Individuals only) : Private Sector Service Public Sector Service Government Service Business Professional Retired Student Forex Dealer Agriculturist Housewife Others Please specify _____

Others (For Individuals only): I am politically Exposed Person I am Related to Politically Exposed Person Not Applicable

ACKNOWLEDGEMENT SLIP (To be filled in by the Applicant)



Received from _____ Folio no/ Application no: _____

Mobile No: | | | | | | | | | PAN: | | | | | | | | |

Request submitted _____

For Office Use Only
Acknowledgement Stamp & Date

Subject to further verification and furnishing of mandatory information/ documents. Please retain this slip until processed

INFORMATION REQUIRED FOR TAX REPORTING (Mandatory. If left blank the application is liable to be rejected)

Category		
Gender		Father's Name
Type of address given at the KRA	<input type="radio"/> Residential or Business <input type="radio"/> Residential <input type="radio"/> Business <input type="radio"/> Registered Office	
Permissible documents are	<input type="radio"/> Passport <input type="radio"/> Election ID Card <input type="radio"/> PAN Card <input type="radio"/> Govt. ID Card <input type="radio"/> Driving License <input type="radio"/> UIDAI Card <input type="radio"/> NRE/GA Card <input type="radio"/> Others	
Country/Place/City of Birth		
Country of citizenship/nationality	<input type="radio"/> Indian <input type="radio"/> U.S. <input type="radio"/> Others (Please, specify _____)	

I am a tax resident of India and not a resident of any other country Yes No

If No, please mandatorily enclose the **FATCA & CRS Declaration for Individual Investors.**

NOMINATION DETAILS for new transmitted folio

(Please ✓) I/We wish to Nominate I/We do not wish to Nominate

I/We do hereby nominate the person(s) named below to receive the units allotted to my/our credit in my/our folio in the event of my/our death. I/We also understand that all payments and settlements made to Nominee(s), and signature(s) of the Nominee(s) acknowledging receipt thereof, will be noted as be a valid discharge by the AMC/Mutual Fund/Trustee. This instruction supercedes all previous nominations made by me/us in respect of the folio indicated above.

Nominee Name and Address	Guardian Name and Address (in case nominee is Minor)	PAN of Nominee/ Guardian (in case Nominee is Minor)	Date of Birth (in case Nominee is Minor)	Allocation (%)	Signature of Nominee/Guardian (in case Nominee is Minor)
Nominee 1					
Nominee 2					
Nominee 3					

DECLARATION & SIGNATURES

I/We do hereby acknowledge and confirm that the information provided above is true and correct to the best of my knowledge and belief. In case any of the above specified information is found to be false or untrue or misleading or misrepresenting or contravening any laws and regulations, I/am aware that I may be liable for it. I also undertake to keep you informed in writing about any changes/modification to the above information in future and also undertake to provide any other additional information as may be required by L&T Mutual Fund or CAMS end or by regulators.

Signature of Unit holder (erstwhile Minor, now Major)	Guardian Signature OR Banker's Signature Attestation (Attach bank letter)
Name _____	<input type="checkbox"/> Guardian's Signature OR <input type="checkbox"/> Banker's Attestation

NOTES

- The document should reflect the Name of the Sole/ First Unit holder, Bank Name, Bank Account Number, MICR Code, IFSC and the Bank Account Type clearly
- The last entry in the Bank Passbook/Bank Statement should not be more than 3 months old
- A copy of any of the above documents can be submitted provided the original is shown at the ISC counter for verification
- Self attested KYC acknowledgment copy. (Date of the letter & KYC acknowledgement should be after the date of attaining majority.)
- New bank account details cannot be submitted for updation, in case redemption is requested with this request.

call 1800 4190 200 or 1800 2000 400

email investor.line@Intmf.co.in

www.Intmf.com

Please note our lines are open from 9 am to 6 pm, Monday to Friday and 9 am to 1 pm on Saturday.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.