

Date: _____

To,
The Trustees
Nippon Life India Asset Management Limited (NAM India)
(Asset Manager of Nippon India Mutual Fund)

Applicant Details (unitholder who is requesting for change of status from MINOR to MAJOR)

Name Mr./Ms. _____

Date of Birth: _D_D_M_M_Y_Y_Y_Y_ **PAN:**

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Tax Status: ☐ Resident Individual ☐ NRI ☐ PIO ☐ Others (please specify) _____

KYC Detail (Please tick ✓ whichever is applicable) : ☐ KYC Acknowledgment attached ☐ KYC form attached ☐ C-KYC Identification No.

Name of the Guardian Mr./Ms. _____

Relationship with the applicant: [Please (✓) tick whichever is applicable]

☐ Father ☐ Mother ☐ Court Appointed Guardian

I, the above applicant, hereby request you to change my status from Minor to Major in the following Folios and delete the Guardian's name therein as I have since become a major, and update the details provided herein in your records.

Folio No(s).

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Contact details of the Applicant.

Mobile No.+91										Tel. No. STD -								
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Mobile No. provided pertains to ☐ Self ☐ Spouse ☐ Dependent children ☐ Dependent Sibling ☐ Dependent Parents ☐ A Guardian in case of a minor ☐ POA ☐ Custodian ☐ PMS

Email Address (Email Id in CAPITAL letters only).

Email ID provided pertains to ☐ Self ☐ Spouse ☐ Dependent children ☐ Dependent Sibling ☐ Dependent Parents ☐ A Guardian in case of a minor ☐ POA ☐ Custodian ☐ PMS

Address of the Applicant

(Please note that address will be updated as per applicant's address on KYC form / KYC Registration Agency records)

Address Line 1

Address Line 2

City **State** **PIN**

Bank Account Details of the Applicant

Please attach & tick ✓ ☐ Cancelled cheque with applicant's name printed OR ☐ Applicant's Bank Statement/Passbook

Name of Bank A/c. Type (✓) ☒ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR

[illegible][illegible]

Additional KYC information (Please tick (✓) whichever is applicable)

Occupation:

☐ Private Sector Service
 ☐ Public Sector Service
 ☐ Government Service
 ☐ Business
 ☐ Professional
 ☐ Agriculturist
☐ Retired
 ☐ Home Maker
 ☐ Student
 ☐ Forex Dealer
 ☐ Others _____ (Please specify)

The applicant is ☐ A Politically Exposed Person ☐ Related to a Politically Exposed Person ☐ Neither (Not applicable)

Gross Annual Income (₹) ☐ Below 1 Lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ 25 Lacs-1crore ☐ >1 crore

Nomination (Please tick (✓) one of the options below)

☐ I wish to make a nomination and hereby nominate the person/s more particularly described in the **Nomination Form** attached herewith, to receive the Units held my folio in the event of my death. *{Recommended}*

☐ I **DO NOT** wish opt for nomination (if the unit holder does not wish to nominate anyone)

I / We, the undersigned applicant(s)/unitholder(s) hereby confirm that I / we do not wish to appoint any nominee(s) in respect of the mutual fund application(s) / units held in my / our mutual fund folio(s) and understand the implications / issues involved in non-appointment of any nominee(s) and am/ are further aware that in case of my demise / death of all the unit holders in the folio, my / our legal heir(s) would need to submit all the requisite documents issued by the Court or such other competent authority, as may be required by the Mutual Fund / AMC for settlement of death claim / transmission of units in favour of the legal heir(s), based on the value of the units held in the mutual fund folio/s.

FATCA and CRS information

Country of Birth _____ Place of Birth _____ Nationality _____

Are you a tax resident of any country other than India? ☐ Yes ☐ No

If Yes, please mention all the countries in which you are resident for tax purposes and the associated Taxpayer Identification Number and its identification type in the column below

Country	Tax-Payer Identification Number	Identification Type

Declaration and Signature of the Applicant

I have attached herewith all the relevant / required documents as indicated below.

I confirm that the information provided above is true and correct to the best of my knowledge and belief.

I undertake to keep Nippon India Mutual Fund / its AMC/RTA informed about any changes/modification to the above information in future and also undertake to provide any other additional information as may be required by the AMC / RTAs.

I hereby authorize Nippon India Mutual Fund and its AMC/RTA to share/disclose any of the information provided by me/us, including any changes in respect thereof to the Mutual Fund's Bankers or my Distributor / Investment Advisor and to such other service providers as may be necessary for any operational reason, including to verify/validate my / our bank account details. I / We also authorize the Mutual Fund & its AMC/RTA to provide/ share any of the information provided by me/us including my holdings in the Mutual Fund to any governmental or statutory or judicial authorities/agencies as required by law without any obligation of informing me/us of the same.

My signature hereinbelow has been attested by ☐ the Guardian on record ☐ My bankers ☐ Notary / JMFC

Place _____

Date _____ Signature of Applicant _____

Signature Attestation

(To be attested by the Guardian (as registered in the folio of the applicant who has become a major) or a Notary or Judicial Magistrate First Class (JMFC)@	
Name of the Guardian / Stamp of the Notary/JMFC	The above signature of the applicant duly attested by me
	_____ Signature

@ Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure 1

Documents attached

- ☐ Copy of PAN Card of applicant
- ☐ KYC Acknowledgment **OR** ☐ KYC form of applicant
- ☐ Cancelled cheque with applicant's name pre-printed **OR** ☐ Applicant's Bank Statement/Passbook
- ☐ Annexure-I – Bankers Attestation of Signature of the applicant
- ☐ Nomination Form