

REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR

To:
 The Trustees,
HSBC Mutual Fund

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

Mr./Ms.	
Date of Birth : <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PAN <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Tax Status: <input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI <input type="checkbox"/> PIO <input type="checkbox"/> Others (please specify) _____	
<input type="checkbox"/> KYC Acknowledgment attached <input type="checkbox"/> KYC form attached <input type="checkbox"/> C-KYC Identification No. Please tick ✓ whichever is applicable	
Name of the Guardian Mr./Ms. _____	
Relationship with the applicant: <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> 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.: + 9 1 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Tel. No. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Email Address: _____	

Address of the Applicant

Address Line 1		
Address Line 2		
City	Pin	State

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

Bank Account Details of the Applicant

Bank Name	
Account number : <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	IFSC Code (11 Digit): <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
A/c Type (Pls ✓): <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> FCNR <input type="checkbox"/> Others _____	MICR Code (9 Digit): <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name of bank branch	
City: _____	Pin <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Please attach & tick ✓ <input type="checkbox"/> Cancelled cheque with applicant's name printed OR <input type="checkbox"/> Applicant's Bank Statement/Passbook	

Additional KYC information (Please tick ✓ whichever is applicable)

Occupation Details	
<input type="checkbox"/> Private Sector Service <input type="checkbox"/> Public Sector Service <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Home Maker <input type="checkbox"/> Student <input type="checkbox"/> Forex Dealer <input type="checkbox"/> Others (Please specify) _____	
The applicant is <input type="checkbox"/> a Politically Exposed Person <input type="checkbox"/> Related to a Politically Exposed Person <input type="checkbox"/> Neither (not applicable)	
Gross Annual Income (₹) <input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lacs <input type="checkbox"/> 5-10 Lacs <input type="checkbox"/> 10-25 Lacs <input type="checkbox"/> 25 Lacs-1crore <input type="checkbox"/> >1 crore	

ACKNOWLEDGEMENT SLIP

Request for Change in status from Minor to Major from _____

_____ for

Folio No. (subject to verification of documents).

ISC Stamp & Signature

Contact Us at : Toll Free Number – 1800 200 2434 / 1800 258 2434 (within India) or +91 44 39923900 (outside India)
 Email id – hsbcmf@camsonline.com

FATCA and CRS details

Country of Birth:	Place of Birth:	Nationality:
Are you a tax resident of any country other than India ? <input type="checkbox"/> Yes <input type="checkbox"/> 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

Nomination (Please ☒ 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 in my folio in the event of my death. {Recommended}

☐ I **DO NOT** wish to make a nomination (Please tick ☒ if you do not wish to nominate anyone)

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 HSBC Mutual Fund / CAMS (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 / RTA.

I hereby authorize HSBC Mutual Fund and its RTA to share/discard any of the information provided by me/us, including any changes in respect thereof to the Mutual Fund's 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 _____

X _____
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
	X _____ 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