

# Mutual Funds

Aditya Birla Sun Life Mutual Fund



ADITYA BIRLA  
CAPITAL

PROTECTING INVESTING FINANCING ADVISING

## Request for change in status from Minor to Major

Form MAM

To:

The Trustees,

Mutual Fund

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

Mr./Ms.

Date of Birth

D D M M Y Y Y Y PAN

Tax Status

☐ Resident Individual

☐ NRI

☐ PIO

☐ Others (please specify)

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

**Name of the Guardian**

Mr./Ms.

Relationship with the applicant:

☐ 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 -

Email Address

**Address of the Applicant**

Address Line 1

Address Line 2

City

State

Pin

(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

11-Digit IFSC

A/C type

☐ SB

☐ Current

☐ NRO

☐ NRE

☐ FCNR

9-Digit MICR No.

Name of bank branch

City

Pin

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

**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

**Acknowledgement Slip** (To be filled in by the Investor)

Application No.

Collection Centre /

ABSLAMC Stamp & Signature

Received from Mr. / Ms. \_\_\_\_\_ Date : \_\_\_\_/\_\_\_\_/\_\_\_\_

# Mutual Funds

Aditya Birla Sun Life Mutual Fund



ADITYA BIRLA  
CAPITAL

PROTECTING INVESTING FINANCING ADVISING

## FATCA and CRS information

|   |                                 |                     |  |
|---|---------------------------------|---------------------|--|
| 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 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 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 \_\_\_\_\_ 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 \_\_\_\_\_ 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: 

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

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

Aditya Birla Sun Life AMC Limited (Investment Manager to Aditya Birla Sun Life Mutual Fund)

Regn. No.: 109, Regd Office: One Indiabulls Centre, Tower 1, 17th Floor, Jupiter Mill Compound,  
841, Senapati Bapat Marg, Prabhadevi, Mumbai - 400013

+91 22 4356 7000 | care.mutualfunds@adityabirlacapital.com | www.adityabirlasunlifemf.com | CIN: U65991MH1994PLC080811

Contact Us:  
1800-270-7000

adityabirlacapital.com



ADITYA BIRLA  
CAPITAL