

Change of Status from Minor to Major



Sponsor: Edelweiss Financial Services Limited. **Trustee Company:** Edelweiss Trusteeship Company Limited. **Investment Manager:** Edelweiss Asset Management Limited. Edelweiss House, 10th Floor, Off C.S.T. Road, Kalina, Santacruz (E), Mumbai 400098, Maharashtra. **Website:** www.edelweissmf.com

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:	<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 as per the Folio 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)	6)
2)	7)
3)	8)
4)	9)
5)	10)

Contact details of the Applicant

Mobile No.	+ 9 1		Tel. No. STD																		
Mobile No. provided pertains to:																		<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Children <input type="checkbox"/> Dependent Sibling <input type="checkbox"/> Dependent Parents <input type="checkbox"/> POA <input type="checkbox"/> Custodian <input type="checkbox"/> PMS			
Email Address																					
Email provided pertains to:																		<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Children <input type="checkbox"/> Dependent Sibling <input type="checkbox"/> Dependent Parents <input type="checkbox"/> POA <input type="checkbox"/> Custodian <input type="checkbox"/> PMS			

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 No.											11-digit IFSC										
A/c. Type	<input type="checkbox"/> SB <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRE <input type="checkbox"/> FCNR										9-digit MICR No.										
Name of bank branch																					
City :													State :					PIN			

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



CHANGE OF STATUS FROM MINOR TO MAJOR [Acknowledgement copy (To be filled by holder)]

Received from Mr./Ms./Mrs.																				
Folio No.																				
																				Signature of First Holder



TOLL FREE
1800 425 0090



NON TOLL FREE
+91-40-23001181



WEBSITE
www.edelweissmf.com



EMAIL
EMFHelp@edelweissmf.com

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

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

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

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

☐ I/We wish to make a nomination and do hereby nominate the following person(s) who shall receive all the assets held in my / our account in the event of my / our death.

Sr. No.	Name of Nominee* (Name as per PAN Card Only)	PAN	Allocation* (%)	Relationship with Investor*	Nominee Date of Birth* (in case of minor)	Guardian Name* (in case of minor)	Guardian/Nominee Signature
1.					DD/MM/YYYY		
2.					DD/MM/YYYY		
3.					DD/MM/YYYY		

☐ I/We DO NOT wish to nominate

Declaration for Nomination (to be signed by all unitholders including joint holders, irrespective of more of holding): I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our MF Folio/ and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my / our MF Folio / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio / Demat account.

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 Edelweiss 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 Edelweiss 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.

Signature Attestation

My signature hereinbelow has been attested by
 ☐ The Guardian on record
 ☐ My banker @
 ☐ Notary / JMFC

Place

 Date

Signature of Applicant

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 (Only to be submitted if Guardian attestation not provided or available)

☐ Nomination details to be filled by the applicant