



# Minor Attaining Majority - Request Form to change Status

To  
Quantum Mutual Fund

Folio No.

Investment was made in the above Folio when I was a minor and the same was represented by \_\_\_\_\_  
<Guardian Name>. As I have completed 18 years of age as on \_\_\_\_\_ <Date>, I hereby request to update, my status as Individual and remove the  
Guardian Name. Please also update the following details in your records for the above referred Folio.

## 1 \* INVESTOR DETAILS

Name of Sole/ 1st Applicant  Mr.  Ms.  Others  Please Specify \_\_\_\_\_

\*PAN/PEKRN  Aadhaar Number

DOB  Tax Status  Residential  NRI / PIO / OCI

Contact Details Mobile No.  Email ID

Tel No - STD Code  Res.  Off.  Fax

## 2 \* BANK ACCOUNT DETAILS

A/c Type [please ✓]  SB  Current  NRO  NRE  FCNR

Bank Name  IFSC  MICR Code

Account No  Branch  City  Pin code

## 3 \* FATCA and CRS Details for Individuals (Mandatory)

The below information is required for all applicants

Category	1 <sup>st</sup> Applicant	2 <sup>nd</sup> Applicant	3 <sup>rd</sup> Applicant
Place/City of Birth			
Country of Birth			
Country of Citizenship / Nationality			

Is your Tax Residency / Country of Birth / Citizenship / Nationality other than India?  Yes  No (Please ✓)

If yes, please indicate all countries in which you are resident for tax purpose and the associated Tax ID number below. In case of POA, the POA holder should mandatorily fill Annexure I for complete details.

Category	1 <sup>st</sup> Applicant	2 <sup>nd</sup> Applicant	3 <sup>rd</sup> Applicant
Country of Tax Residency 1			
Tax Payer Reference ID No. 1			
Country of Tax Residency 2			
Tax Payer Reference ID No. 2			

## 4 \* NOMINATION DETAILS

I do not wish to Nominate

	1 <sup>st</sup> Nominee	2 <sup>nd</sup> Nominee	3 <sup>rd</sup> Nominee
Name (as in PAN card/KYC records)			
PAN			
Date of Birth	DDMMYYYY	DDMMYYYY	DDMMYYYY
Relationship with Investor			
Address			
Guardian Name (in case Nominee is a Minor)			
Allocation % (Total to be 100%)			

Signature of First Holder (Major)	Guardian's Attestation	Bank Attestation
Name:	Registered Guardian's Name:	OR Branch Seal with name, designation and employee number

## Documents attached:

1. KYC Confirmation Letter / KYC acknowledgment copy along with PAN Card copy.
2. Attach Any one of following:
- Cancelled Cheque with Name & Account number printed on it.
  - Original Bank statement / Copy of the Bank Statement showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager.
  - Copy of Pass book showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager.

Please note:

(You may produce the originals of the documents mentioned above, along with the photocopies, at the counter, we shall verify them and return the originals to you, or photocopies can be submitted attested by the Banker Manager, (name, designation, employee code, and seal should be affixed, clearly on the copy).

## ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Quantum Mutual Fund-7<sup>th</sup> Floor, Hoechst House, Nariman Point, Mumbai - 400 021. [www.QuantumMF.com](http://www.QuantumMF.com)

We acknowledge the receipt of the request for change of status from minor to major from Mr. / Ms. / M/s. \_\_\_\_\_

in Folio No. \_\_\_\_\_ with Quantum Mutual Fund

Date of receipt at \_\_\_\_\_

SEAL

## INSTRUCTIONS AND TERMS & CONDITIONS :

As per SEBI regulations when the units are held on behalf of the minor, the ownership of the units rests with the minor. A guardian shall operate the account until the minor attains the age of majority.

- 1) In the event of minor attaining majority, existing standing instructions on SIP/STP/SWP shall continue to be processed until the change of status is effected in the records of the mutual fund. Prior to minor attaining majority, an advance notice will be sent to the registered Email ID /correspondence address advising the guardian to submit an application form (attached herewith) along with prescribed documents specified therein to change the status of the account to "major". The existing standing instructions shall be terminated immediately after successful change of status from Minor to Major in our records.
- 2) The account shall be frozen for operation by the guardian on the day the minor attains the age of majority and no transactions other than existing SIP, STP, SWP shall be permitted till successful change of status in our records.