

Tax Status Change Request Form



Quantum Mutual Fund - 1st floor, Apeejay House, 3 Dinshaw Vachha Road, Backbay Reclamation, Churchgate, Mumbai - 400 020 | www.QuantumAMC.com

1. Investor and Investment details Please ✓ wherever applicable.

Name of the Investor _____

PAN No. _____ Folio No. _____

2. Change in Tax Status

Please Change the Tax Status for Sole/ First Unitholder as under, for the aforementioned Folio.

Resident Individual to Non Resident Individual Non Resident Individual to Resident Individual

(Note - Resident Indian (Individual) to NRI-Repatriable (NRE) & NRI-Non Repatriable (NRO) to NRI-Repatriable (NRE) not allowed).

For existing SIP please attach the following: OTM Modification Form USA/Canada Declaration (only applicable to NRI from USA and Canada)

3. Overseas Address (Mandate for change status from RI to NRI)

Address _____

City _____ State _____ Country _____ Zip code _____

4. Bank Details

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

Bank Name _____ Branch _____

Account No _____ IFSC _____ MICR Code _____ City _____ Pin Code _____

*Mandatory - Please attach either a Cancelled Cheque with first applicant name and account number pre-printed on the face of the cheque or a Bank statement/certified bank passbook or a bank letter/ Certificate duly signed by Bank Branch Manager/ Authorized Personnel.

5. FATCA And CRS Details For Individuals (Including Sole Proprietor) (Mandatory) The Below information is required for all applicants/guardian

	Place/City of Birth	Country of Birth	Country of Citizenship/Nationality
1 st Applicant/Guardian			<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <small>Please specify</small>
2 nd Applicant			<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <small>Please specify</small>
3 rd Applicant			<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <small>Please specify</small>
POA Holder			<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <small>Please specify</small>

Are you a tax resident (i.e. are you assessed for tax) in any other country outside India? Yes NO (Please tick ✓)

If "YES" please fill for ALL countries (other than indian in which you are a Resident for tax purpose i.e. where you are a Citizen/Resident/Green Card Holder/Tax Resident in the respective countries)

	Country of Tax Residency [#]	Tax Identification Number or Functional Equivalent	Identification Type* (TIN or other please specify)	If TIN is not applicable <small>Please tick (✓) the reason [as defined below]</small>
1 st Applicant/Guardian				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
2 nd Applicant				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
3 rd Applicant				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
POA Holder				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

[#]To also include USA, where the individual is a citizen/ green card holder of USA. ^{*}In case Tax Identification Number is Not available, kindly provide its functional equivalent.

→ Reason A → The country where the Account Holder is liable to pay tax does not issue TIN to its residents.

→ Reason B → No TIN required [Select this reason only if the authorities of the respective country of tax residence do not required the TIN to be collected]

→ Reason C → Others – Please specify the reasons _____

[#]Please indicate all countries, other than India, in which your are a resident for tax purpose, associated Taxpayer Identification Number & Its Identification type e.g: TIN etc.

ACKNOWLEDGEMENT SLIP for Tax Status Change Form (To be filled in by the Investor) Updation will be subject to Validations

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Folio number _____

Date: _____

Received from: Mr./Ms./M/s _____

Collection Center's Stamp & Receipt Date and Time

