



MINOR ATTAINING MAJORITY - REQUEST FORM TO CHANGE STATUS

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

Folio No.

1. *INVESTOR DETAILS

Name of Sole/1st Applicant Mr. Ms. Other Please Specify

*PAN/PEKRN

DOB Tax Status Resident Individual NRI

Contact Details Mobile No. Email ID

This email id belongs to (Mandatory Please ✓): Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian

This mobile number belongs to (Mandatory Please ✓): Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian

Tel No-STD Code Res. Off. Fax

2. Additional KYC Details (Occupation)

Professional Service Agriculturist Housewife Retired Government Service/Public Sector Business

Forex Dealer Student Private Sector Service Others

3. Gross Annual Income Details

Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs 25 Lacs-1 Crore >1 Crore Net-worth in Rs.

Date

4. PEP Details	1 st Applicant
Are you a Politically Exposed Person (PEP)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you related to a Politically Exposed Person (PEP)	<input type="checkbox"/> Yes <input type="checkbox"/> No

5. Overseas Address (Mandate for NRI)

Address

City State Country Zip code

6. *Bank Account Details

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

Bank Name IFSC MICR Code

Account No Branch City Pin Code

7. *FATCA (Mandatory)

The below information is required for all applicants/guardian

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.

Country of Tax residency Tax Identification Number or Functional Equivalent

Identification Typ (TIN or other please specify)

8. *Nomination Details	1 st Nominee	2 nd Nominee	3 rd Nominee
NName of the Nominee(s) (as in PAN card/KYC records)			
Date of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y
Relationship with Investor			
Address			
Guardian Name (in case Nominee is a Minor)			
Guardian's relationship with minor	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian
Share of Nominee Allocation % (Total to be 100%)			
Mobile / Telephone no. of Nominee(s) / Guardian in case of minnor			
Email Id of Nominee(s) / Guardian in case of minnor			

OR I do not wish to Nominate

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, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio.

Signature of First Holder (Major)	Guardian's Attestation	OR	Bank Attestation
Name:	Registered Guardian's Name:		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 / self attested Bank statement / Copy of the Bank Statement showing A/c holder Name and A/c No.
 - Copy of Pass book showing A/c holder Name and A/c No.

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).

SAVE

RESET

ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Quantum Mutual Fund - 1st Floor, Apeejay House, 3 Dinshaw Vachha Road, Backbay Reclamation, Churchgate, Mumbai - 400 020 | www.QuantumAMC.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, the existing standing instructions on SIP/STP/SWP shall be suspended when the minor attains majority, till the status is changed to major.
- 2) The account shall be frozen for operation by the guardian on the day the minor attains the age of majority and no further transactions shall be allowed till the status of the minor is changed to major.