

MONARCH MUTUAL FUND
Request for change in status from Minor to Major

To,
Monarch Mutual Fund,
KFin Technologies Limited
Selenium Tower B, Plot No: 31 & 32,
Financial District, Nanakramguda,
Serilingampally Mandal, Hyderabad - 500032.

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

Mr./Ms.																			
Date <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y	PAN <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
D	D	M	M	Y	Y	Y	Y												
Tax Status: ☐ Resident Individual ☐ NRI ☐ PIO ☐ Others (Please Specify)																			
☐ KYC Acknowledgment attached ☐ KYC form attached ☐ C-KYC Identification No. <i>Please tick (✓) whichever is applicable</i>																			
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 <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>								

*(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 Code <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
A/c. Type ☐ SB ☐ Current ☐ NRO ☐ NRE ☐ FCNR	9-digit MICR Code <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
Name of bank branch _____													
City _____	PIN <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
<i>Please attach & tick ☐ Cancelled cheque with applicant's name printed OR ☐ Applicant's Bank Statement/Passbook</i>													

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 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}*

☐ 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

Date _____ 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
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@ 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