

# Form for Updation of Status from Minor to Major



(Applicable to Minor attaining Majority)

Please fill in the information below legibly in English and in CAPITAL LETTERS)

To:

JM Financial Mutual Fund

Date: \_\_\_ / \_\_\_ / 20\_\_

## A. Unitholder's information

Folio No.	<input type="text"/>	and	<input type="text"/>
Name of the Minor (now Major)	<input type="text"/>		
Date of Birth	<input type="text"/>		
Guardian's name in the folio	<input type="text"/>		

As I, the above named unitholder have now become major upon completion of 18 years of age, you are requested to update the same in your records alongwith my below mentioned details to enable me to deal with my holdings with your Fund independently .

## B. New Bank Details: (Mention new bank details and enclose mandatory documents as mentioned below)

Any one of:	<input type="checkbox"/> Cancelled Cheque or	<input type="checkbox"/> Bank Statement* or	<input type="checkbox"/> Certified copy of Pass Book*	*Not more than 3 months old
Account Type	<input type="checkbox"/> Saving	<input type="checkbox"/> Current	<input type="checkbox"/> NRE	<input type="checkbox"/> NRO
Account Number	<input type="text"/>			
MICR (9 digit)	<input type="text"/>	IFSC Code (11 character)	<input type="text"/>	
Name of the Bank	<input type="text"/>			
Branch Address	<input type="text"/>			
Branch City	<input type="text"/>	Pin Code	<input type="text"/>	

## C. Updation of Mobile/Email and PAN

Mobile No.	<input type="text"/>	PAN	<input type="text"/>	Please attach PAN card copy
KYC Acknowledgment Attached	<input type="checkbox"/> YES	<input type="checkbox"/> NO	FATCA Form submitted (Mandatory)	Yes <input type="checkbox"/>
Email ID	<input type="text"/>			

## D. Nomination Details: I wish to nominate as under. I do not wish to nominate (it is advisable to have nomination)

Nominee Name with percentage	1. <input type="text"/>	%
	2. <input type="text"/>	%
	3. <input type="text"/>	%
Nominee's Date of Birth (in case of Minor)/Age	<input type="text"/>	
Guardian's Name (if nominee is minor)	<input type="text"/>	
Guardian's Address	<input type="text"/>	
Nominee's Signature (Not Mandatory)	<input type="text"/>	

## E. Declaration and Signature of Unitholder

I have read and understood the guidelines printed on the reverse of this form and agree to abide by the same.

<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature of the minor who has now become major	Signature of the Guardian whose name is appearing on the Account Statement confirming and attesting the signature of the unitholder.	Signature of the minor attained Majority attested by the bank with seal. (Please furnish name, designation and Emp. code of the attesting authorized official of the bank)



## Acknowledgement for Form for Updation of Status from Minor to Major (to be filled by the unit holder)

Received, subject to verification, a Form for Updation of Status from Minor to Major	
from Mr/ Mrs/ Ms:	
Folio No.:	Receiving ISC's official stamp with date and signature
Registrar: Karvy Computershare Pvt. Ltd., Unit: JM Financial Mutual Fund, Karvy Plaza, H.No.8-2-596, Avenue 4, Street NO 1, Banjara hills Hyderabad - 500 034	

## Guidelines

1. In order to protect the interest of the investors, following self-attested documents are requested for updating the Bank Details: Proof of New bank account (Please refer to Para B of the Form on the reverse)
2. Please carry the original documents of the copies you wish to submit towards the proof. The original will be returned to you after verification, across the counter.
3. Please fill in the Form in CAPITAL LETTERS.
4. Please submit self-attested copies of PAN Card and KYC (through KRA i.e. KYC Registration Agency) acknowledgement .
5. For updation of Email ID, Bank account and KYC compliance details, please furnish the details overleaf.
6. In case, you wish to register more than one bank account (upto 5), please fill up "Multiple Bank Account Registration Form".
7. In case of any assistance, please contact nearest Investor Service Center of M/s JM Financial Asset Management Ltd. or M/s Karvy Computershare Pvt Ltd.
8. The unitholder is required to go through the Scheme related documents.

### **Check list: Please ensure that**

- The Form is complete in all respects
- The form is signed by the unit holder i.e. minor who has attained majority
- Copy of proof of New bank account is attached
- Copy of PAN card and KYC acknowledgement is attached.
- FATCA / CRS Form is submitted.