

# REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR (1/2)



## UNITHOLDER DETAILS

Name of the Unitholder: \_\_\_\_\_

Date of Birth  PAN<sup>1</sup>

Tax Status:  Resident Individual  NRI  PIO  Others \_\_\_\_\_ (please specify)

KYC Acknowledgment attached  KYC form attached  C-KYC Identification No. (Please ✓ whichever is applicable)

<sup>1</sup> As per the section 139AA of the Income Tax Act 1961, it is mandatory to link your Aadhaar with PAN

Name of the Guardian: \_\_\_\_\_

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.

## CONTACT DETAILS

**Mobile**  **Email** \_\_\_\_\_

Mobile No. provided pertains to: (Please ✓)

Self  Spouse  Dependent Children  Dependent Siblings  Dependent Parents  Guardian  PMS  Custodian  POA

Email ID provided pertains to: (Please ✓)

Self  Spouse  Dependent Children  Dependent Siblings  Dependent Parents  Guardian  PMS  Custodian  POA

## ADDRESS OF THE APPLICANT

Address Line 1 \_\_\_\_\_

Address Line 2 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ PIN

(Please note that address will be updated as per applicant's address on KYC form / KYC Registration Agency records)

## BANK DETAILS Change Primary Bank

Bank A/c No.

Account Type (Please ✓)  Savings  Current  NRE  NRO  Others \_\_\_\_\_ (please specify)

Bank Name \_\_\_\_\_ Bank City \_\_\_\_\_

IFSC (11 digits)  MICR (9 digits)

New bank details (Attach any one of the following) (✓)

A cancelled original cheque leaf/self attested copy of cancelled cheque. (Name of the first holder should be printed on the face of the cheque leaf)

Self attested photocopy of bank passbook or bank account statement (Having entries not older than 3 months)

## ADDITIONAL KYC INFORMATION (Please ✓ whichever is applicable)

**Occupation**  Private Sector Service  Public Sector Service  Government Service  Professional  Agriculturist  Retired  Home Maker  Student  Forex Dealer  Others \_\_\_\_\_ Please specify

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-1 crore  >1 crore

## FATCA & CRS INFORMATION (For Individual Investors including Sole Proprietor. Non Individual investors should mandatorily fill separate FATCA form)

	1st Unitholder	2nd Unitholder	3rd Unitholder
Place of Birth			
Country of Birth (✓)	<input type="checkbox"/> India <input type="checkbox"/> Others _____ Please specify	<input type="checkbox"/> India <input type="checkbox"/> Others _____ Please specify	<input type="checkbox"/> India <input type="checkbox"/> Others _____ Please specify
Nationality (✓)	<input type="checkbox"/> Indian <input type="checkbox"/> Others _____ Please specify	<input type="checkbox"/> Indian <input type="checkbox"/> Others _____ Please specify	<input type="checkbox"/> Indian <input type="checkbox"/> Others _____ Please specify
Are you a tax resident of any country other than India (✓)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

If Yes: Mandatory to enclose FATCA / CRS Annexure

MAM\_V1 January 2024

# REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR (2/2)

## NOMINATION DETAILS

Nominee Name _____	Date of Birth	<table border="1"><tr><td>D</td><td> </td><td>D</td><td> </td><td>M</td><td> </td><td>M</td><td> </td><td>Y</td><td> </td><td>Y</td><td> </td><td>Y</td><td> </td><td>Y</td></tr></table>	D		D		M		M		Y		Y		Y		Y
D		D		M		M		Y		Y		Y		Y			
Address _____																	
Relationship with applicant _____							Name of Guardian (in case nominee is a minor) _____										
Nominee (%) _____							Nominee Signature _____										
<input type="checkbox"/> Declare that I / We do not wish to appoint a nominee for our investments in the above folio. I / We understand that in the event of death of all unitholder(s) in the folio, the legal heirs for the unit holders would need to submit all requisite documents for transmitting the units in favour of the legal heir based on applicable legal / regulatory requirements at the stage of initiation of the transmission request.																	
<b>If you wish to appoint multiple nominees, please use the multiple nomination form available or visit our website to update nomination.</b>																	

## 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 PGIM India Mutual Fund / 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.

I hereby authorize PGIM India Mutual Fund and its 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 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

Place _____	Signature of Applicant														
Date <table border="1"><tr><td>D</td><td> </td><td>D</td><td> </td><td>M</td><td> </td><td>M</td><td> </td><td>Y</td><td> </td><td>Y</td><td> </td><td>Y</td><td> </td><td>Y</td></tr></table>		D		D		M		M		Y		Y		Y	
D		D		M		M		Y		Y		Y		Y	

## 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

@ Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure enclosed

## 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 – Bankers Attestation of Signature of the applicant
- Nomination Form

