

# Request for Updation of Sole/First Holder Details

(To be used for minor unit holder upon attaining majority)



Please complete all sections in English. For legibility, please use BLOCK LETTERS in black or dark ink

L&T Mutual Fund

Sub: Change of tax status from minor to major under Folio \_\_\_\_\_

Name of Sole/1st Unit Holder (Minor) \_\_\_\_\_ First Name \_\_\_\_\_ Middle Name \_\_\_\_\_ Last Name \_\_\_\_\_ Folio No. \_\_\_\_\_

Name of the Guardian (on the folio): \_\_\_\_\_

PAN/PEKRN\*\* \_\_\_\_\_ First Unit Holder \_\_\_\_\_ Second Unit Holder \_\_\_\_\_ Third Unit Holder \_\_\_\_\_

Aadhaar No. \_\_\_\_\_ First Unit Holder \_\_\_\_\_ Second Unit Holder \_\_\_\_\_ Third Unit Holder \_\_\_\_\_

KIN\* \_\_\_\_\_ First Unit Holder \_\_\_\_\_ Second Unit Holder \_\_\_\_\_ Third Unit Holder \_\_\_\_\_

Date of Birth\* (1st Unit Holder) [D][D][M][M][Y][Y][Y][Y] Date of Birth\* (2nd Unit Holder) [D][D][M][M][Y][Y][Y][Y] Date of Birth\* (3rd Unit Holder) [D][D][M][M][Y][Y][Y][Y]

Mobile No. +91- \_\_\_\_\_ E-mail ID \_\_\_\_\_

KYC is mandatory. Please enclose copies of KYC acknowledgement letters for all applicants. \*\*PEKRN required for Micro investments upto Rs. 50,000 in a year.

^ 14 digit KYC Identification Number (KIN) and Date of Birth is mandatory for Individual(s) who has registered under Central KYC Records Registry (CKYCR).

Dear Sir/Madam,

This is to inform you that I, \_\_\_\_\_ name of the minor on folio \_\_\_\_\_ have attained majority. You are requested to update my following details in the folio:

## A. IDENTITY DETAILS

Tax Status (please ✓)  Resident Individual  Non Resident  Foreign National

PAN (Unit Holder) \_\_\_\_\_ Please enclose a self attested copy of your PAN Card

## B. CONTACT DETAILS

Tel. (Office) (ISD) (STD) \_\_\_\_\_ Tel. (Res) (ISD) (STD) \_\_\_\_\_

Mobile (ISD) (STD) \_\_\_\_\_ Fax (ISD) (STD) \_\_\_\_\_

Email ID \_\_\_\_\_

## C. BANK ACCOUNT DETAILS

Account Number \_\_\_\_\_

Account Type (please ✓)  Saving  Current  NRE  NRO  FCNR  Others \_\_\_\_\_

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

Branch \_\_\_\_\_ City \_\_\_\_\_

IFSC \_\_\_\_\_ MICR Code \_\_\_\_\_

(11 character code. You should find it on your cheque leaf)

(9-digit number next to your cheque no)

I/We wish to have the above bank account as my/our primary account for redemption/dividend pay outs (Please ✓)

Please submit an original cheque leaf with your name and the above above details printed on it.

## LIST OF ENCLOSED DOCUMENTS (Any one document from the below list is mandatory) (see notes overleaf)

- Original Cheque Leaf **OR**  Copy of the Passbook attested by the Bank Manager  
 Confirmation on Banker's letterhead  
 Copy of Bank Statement attested by the Bank Manager

## YOUR SIGNATURE/S

X Name of Sole/1st Bank A/C holder

X Name of 2nd Bank A/C holder

X Name of 3rd Bank A/C holder

X Sign as per bank records

X Sign as per bank records

X Signature and Stamp of the Authorise Official from Bank

## E. ATTESTATION BY BANK MANAGER (DETAILS VERIFIED FROM BANK'S RECORDS)

Name of the Banker \_\_\_\_\_ Employee Code \_\_\_\_\_

I/We certify that the signature of account holder(s) and the details of bank account are correct as per our records.

You are also requested to strike off the name of the guardian registered under the folio in light of me attaining majority

Yours Sincerely,

Name of the First Unit Holder

Name of the Guardian

Signature of the First Unit Holder

Signature of the Guardian

Stamp & Date

## NOTES

- 1) The document should reflect the Name of the Sole/ First Unit holder, Bank Name, Bank Account Number, MICR Code, IFSC and the Bank Account Type clearly
- 2) The last entry in the Bank Passbook/Bank Statement should not be more than 3 months old
- 3) A copy of any of the above documents can be submitted provided the original is shown at the ISC counter for verification
- 4) Self attested KYC acknowledgment copy. (Date of the letter & KYC acknowledgement should be after the date of attaining majority.) KYC is not mandatory, in case redemption is requested with this request.
- 5) New bank account details cannot be submitted for updation, in case redemption is requested with this request.

**call** 1800 2000 400 or 1800 4190 200

**email** [investor.line@Intmf.co.in](mailto:investor.line@Intmf.co.in)

**www.**[Intmf.com](http://Intmf.com)

Please note our lines are open from 9 am to 6 pm, Monday to Friday and 9 am to 1 pm on Saturday.

**Mutual Fund investments are subject to market risks, read all scheme related documents carefully.**

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