

# MINOR ATTAINING MAJORITY - REQUEST FORM TO CHANGE STATUS

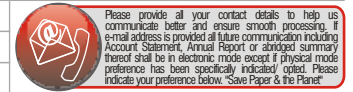
Please read the instructions carefully and complete the relevant section legibly in black / dark coloured ink and in BLOCK LETTERS.

To,  
Union KBC Mutual Fund

Folio No.	
Minor's name in the folio (now major) <input type="radio"/> Mr. <input type="radio"/> Ms.	

Investments were made in the above Folio when I was a minor and the same was represented by \_\_\_\_\_ <Guardian Name>  
As I have completed 18 years of age as on \_\_\_\_\_, I request you to transfer all units in my name and remove the Guardian Name from the Folio. Also update the following details in your records for the above referred Folio.

<b>1. INVESTOR PARTICULARS</b>		* mandatory
PAN No.*		Status <input type="radio"/> Resident Individual <input type="radio"/> NRI
Mailing address (P. O. Box address is not sufficient.)		
City	State	Pin Code
Tel. (Off.)	Country/ Area code	Mobile Country/ Area code
Tel. (Res.)	Country/ Area code	Fax Country/ Area code
E-mail		
OCCUPATION <input type="radio"/> Service <input type="radio"/> Housewife <input type="radio"/> Business <input type="radio"/> Professional <input type="radio"/> Student <input type="radio"/> Political Rep. <input type="radio"/> Others (Please Specify)		
Please shade (●) if applicable <input type="radio"/> Politically Exposed Person [PEP] <input type="radio"/> Related to Politically Exposed Person [RPEP]		



<b>2. BANK PARTICULARS</b> [Please shade (●)] (Multiple Bank Accounts Registration form available at www.unionkbcmf.com)	
Bank Name*	
Bank A/C No	Bank Branch
A/C Type*	<input type="radio"/> Savings <input type="radio"/> Current <input type="radio"/> NRE <input type="radio"/> NRO <input type="radio"/> FCNR <input type="radio"/> Others (Please Specify)
Bank City	State
IFSC CODE	MICR CODE

(IFSC Code is the 11 digit no. appearing on your cheque leaf, mandatory for credit via NEFT/ RTGS) (MICR Code is the 9 digit code next to the cheque no.)

<b>3. INVESTOR PROFILE</b> [Please shade (●)]		Gross Annual Income				
Applicant	Gender <input type="radio"/> M <input type="radio"/> F	Below 1 lakh	1-5 lacs	5-10 lacs	10-25 lacs	>25 lacs
Net Worth in INR				As on Date	D D M M Y Y Y Y	

<b>4. NOMINATION DETAILS*</b> [Please shade (●)] (In case of multiple nominees, please complete the separate nomination form available on our website)	
<input type="radio"/> Please register nomination as requested below <input type="radio"/> I/ We wish to nominate multiple nominees® <input type="radio"/> I/ We do not wish to nominate® (Please strike out the form below)	
I hereby nominate the under mentioned Nominee to receive the amounts to my credit in the event of my death. I also understand that all payments and settlements made to such Nominee shall be a valid discharge by the AMC / Mutual Fund / Trustee.	
Name of the Nominee : _____ Address : _____	
Relationship : _____ Date of Birth (In Case of Minor) ____/____/____	
Name of the Guardian (in case of minor): _____ Signature of Nominee/ Guardian (not mandatory)	

<b>5. DECLARATION AND SIGNATURES</b>		
Having read and understood the contents of the relevant Scheme Information Document, Key Information Memorandum and Statement of Additional Information of Union KBC Mutual Fund, instructions and addenda issued by Union KBC Mutual Fund and the terms and conditions and policies on it's website, I hereby agree to abide by the terms and conditions, rules and regulations of the respective Scheme(s) of Union KBC Mutual Fund in relation to the units held under the above mentioned Folio. I hereby nominate the above nominee to receive all the amounts to my credit in the event of my death and have read the instructions for nomination.		
Guardian Signature	Signature of Unit holder (erstwhile Minor, now Major)	Banker's Attestation* (Branch Seal with attester's name and employee number)

\*Signature attestation of the major by a Manager of a scheduled bank / Bank Certificate / Letter

For the checklist of documents required to be provided refer overleaf.

## ACKNOWLEDGEMENT SLIP

We acknowledge the receipt of the request for change of status from minor to major from  
Mr. / Ms. \_\_\_\_\_ in Folio  
No. \_\_\_\_\_ with Union KBC Mutual Fund. [subject to scrutiny and verifications].  
Enclosed: \_\_\_\_\_

Collection centre's stamp with date and time of receipt

# INSTRUCTIONS

1. Please read the Scheme Information Document (SID), Statement of Additional Information (SAI) and Key Information Memorandum (KIM) and relevant addenda thereto, if any, carefully. All applicants are deemed to have read, understood and accepted the terms and agreed to bind themselves to the terms upon signing the application form.
2. The application form must be filled in English in BLOCK letters using black or dark blue coloured ink. Incomplete applications are liable to be rejected. Please refer to the check list given below, to ensure that the requisite details and documents have been provided, this will help in avoiding processing delays and/or rejection of your application form.
3. Correction/cancellation of any information should be countersigned by the applicant.
4. Nomination shall be mandatory for new folios / accounts opened by individuals especially with sole holding. Even those investors who do not wish to nominate must separately confirm their non-intention to nominate. Investors are requested to note that applications for new folios / accounts for individuals in single holding without nomination and applications without separate confirmation from investors who do not wish to nominate are liable to be rejected in the sole discretion of the AMC.
5. In case an investor fails to submit the required documents, the guardian cannot undertake any financial and non-financial transactions including fresh registration of Systematic Transfer Plan (STP), Systematic Investment Plan (SIP) and Systematic Withdrawal Plan (SWP) after the date of the minor attaining majority. For further details refer the section on 'Investments of the minor investor on attaining majority' in the SAI.
6. Account statements/ Consolidated Account Statement, newsletters, Annual Reports/abridged summary thereof and other kinds of communication will be sent only through e-mail instead of physical, for investors who have provided their e-mail address on the application forms. However, in case the investors wish to get the hard copy of these documents, they are requested to specifically indicate their preference in the application forms or send an e-mail to investorcare@unionkbc.com or contact the customer service centre. In case, the email id is not provided in the form, the documents shall be sent by physical mode by default.
7. Signature(s) should be in English or in any of the Indian languages specified in the eighth schedule of the Constitution of India. Thumb impressions (left hand for males and right hand for female) and signatures in languages not specified in the Eighth Schedule of the Constitution of India should be attested by a Magistrate or a Notary public or a Special Executive Magistrate under his/ her official seal.
8. In case any of the required documents are not submitted by the investor, the application form will be liable for rejection.
9. **Check List of documents required to be submitted:**
  - a. Minor attaining majority request form to change status, duly filled.
  - b. Signature attestation of the major by a Manager of a scheduled bank / Bank Certificate / Letter
  - c. Copy of PAN Card
  - d. Proof of KYC Compliance of the major
  - e. Any one of the following documents towards proof of bank account (New Bank Mandate) :
    - Cancelled original cheque of the bank account with first unit holder's name and bank account number printed on the face of the cheque (unitholders should cancel the cheque and write 'cancelled' on the face of the cheque to prevent any misuse); or
    - Self attested copy of bank statement not older than 3 months; or
    - Bank Passbook with current entries not older than 3 months; or
    - Letter from the Bank on its Letterhead confirming the bank account holder with the account details, duly signed by Branch Manager/authorized personnel

In case, if a copy of the above documents are submitted, investor shall submit the original to the customer service centre for verification of original and the same shall be returned after verification.

Please address all future communication(s) in connection with this application to the Registrar & Transfer Agent of the Scheme:

**Computer Age Management Services Pvt. Ltd.,**

Unit: Union KBC Mutual Fund

Ground Floor No.178/10, Kodambakkam High Road, Opp. Hotel Palmgrove, Nungambakkam, Chennai, Tamil Nadu - 600 034.

**Email:** enq\_uk@camsonline.com | **Website:** www.camsonline.com



**Union KBC Asset Management Company Pvt. Ltd.**

Unit 802, 8th Floor, Tower 'A', Peninsula Business Park, Ganpatrao Kadam Marg, Lower Parel (West), Mumbai - 400013.

**Toll Free:** 1800 200 2268 | **Tel No.:** 022 24833333

**Website:** www.unionkbcmf.com | **Email:** investorcare@unionkbc.com