

REQUEST FOR CHANGE IN STATUS FROM MINOR TO MAJOR

To,

Date

Helios Mutual Fund

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

Name: Mr./Ms.

Date of Birth:

PAN :

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

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

Name of the Guardian Mr./Ms.:

Relationship with the applicant: [Please (✓) tick whichever is applicable] 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:

Mobile No. provided pertains to Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian in case of a minor

Email Address (Email Id in CAPITAL letters only)

Email ID provided pertains to Self Spouse Dependent Children Dependent Siblings Dependent Parents Guardian in case of a minor

Address of the Applicant

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

Address Line 1

Address Line 2

City State PIN

Bank Account Details of the Applicant

Please attach & tick (✓) Cancelled cheque with applicant's name printed OR Applicant's Bank Statement/Passbook

Name of Bank A/c. Type (✓) SB Current NRO NRE FCNR

Account No. Bank Branch

Branch City PIN IFSC Code MICR Code

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 (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

Acknowledgement for Form for updation of Status from Minor to Major subjected to verification (To be filled by the Unit Holder)

From Mr./Mrs.Ms.:

Folio No.:

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}

I DO NOT wish opt for nomination (if the unit holder does not wish to nominate anyone)

I / We, the undersigned applicant(s)/unitholder(s) hereby confirm that I / we do not wish to appoint any nominee(s) in respect of the mutual fund application(s) / units held in my / our mutual fund folio(s) and understand the implications / issues involved in non-appointment of any nominee(s) and am/ are further aware that in case of my demise / death of all the unit holders in the folio, my / our legal heir(s) would need to submit all the requisite documents issued by the Court or such other competent authority, as may be required by the Mutual Fund / AMC for settlement of death claim / transmission of units in favour of the legal heir(s), based on the value of the units held in the mutual fund folio/s.

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

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 Helios 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 Helios 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 herein below has been attested by the Guardian on record My bankers Notary / JMFC

Place

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
	<hr style="width: 80%; margin: 0 auto;"/> Signature

@ 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 KYC form of applicant
 Cancelled cheque with applicant's name pre-printed Applicant's Bank Statement/Passbook
 Annexure-I – Bankers Attestation of Signature of the applicant
 Nomination Form