

## 1. My Details (Please provide the following details in full)

**Folio No.**

**Name**  Mr. / Ms. / M/s.

**PAN** First Unitholder  Second Unitholder  Third Unitholder

**Status changed in KYC**  Yes  No (Provide KYC form with supporting documents)  Yes  No (Provide KYC form with supporting documents)  Yes  No (Provide KYC form with supporting documents)

## 2. Change in Tax Status (Please tick ✓)

Please Change the Tax Status for Sole/First Unit-holder as under, for the aforementioned Folio

Resident Individual to Non-Resident Individual  Non-Resident Individual to Resident Individual

## 3. Overseas Address (Mandatory incase of RI to NRI)

**Address**

**City**  **State**  **Country**  **PIN**

## 4. Bank Details

**Bank Name**

**Account No**  **A/c Type (please✓)**  SB  Current  NRO  NRE  FCNR

**Bank Address**

**City**  **State**  **Country**  **PIN**

**IFSC Code**  **MICR Code**

## 5. \*FATCA AND CRS DETAILS FOR INDIVIDUALS (Mandatory)

The below information is required for all applicants/guardian

	Place / City of Birth	Country of Birth	Country of Citizenship / Nationality
First Applicant / Guardian	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <u>Please Specify</u>
Second Applicant	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <u>Please Specify</u>
Third Applicant	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Indian <input type="checkbox"/> U.S. <input type="checkbox"/> Others <u>Please Specify</u>

Is your Tax Residency/Country of Birth/Citizenship/Nationality other than India?  Yes  No (please ✓)

If yes, please indicate all countries in which you are resident for tax purpose and the associated Tax ID number below, In case of POA, the POA holder should mandatorilly fill Annexure I for complete details.

	Country of Tax Residency	Tax Identification Number or Functional Equivalent	Identification Type (TIN or other please specify)	Identification Type (TIN or other please specify)
First Applicant / Guardian	<input type="text"/>	<input type="text"/>	<input type="text"/>	Reasons <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
Second Applicant	<input type="text"/>	<input type="text"/>	<input type="text"/>	Reasons <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
Third Applicant	<input type="text"/>	<input type="text"/>	<input type="text"/>	Reasons <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

Reason A - The country where the Account Holder is liable to pay tax does not issue Tax Identification Number to its residents

Reason B - No TIN required (Select this reason only if the authorities of the country of tax residence do not require the TIN to be cancelled)

Reason C - Others please state the reasons thereof

Signature (s)

Primary

Jointholder

Jointholder 2

**Name**

**Date**                 **Place**

**Instruction points to be given below the form is -**

1. Proof of Bank Details.
2. Proof of Overseas Address.
3. KYC Form and supporting documents if the status is not changed in KYC record.
- 4.. FATCA Declaration.