

# Minor Attaining Majority

To,  
Invesco Mutual Fund

Folio Number

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

## 1. Applicant Details

CKYC (✓)  KIN

PAN \*  Date of Birth

Mobile No.  Email Id

Tel. (Res)  Tel. (Office)

Gross Annual Income (✓)  Below 1 Lac  1-5 Lacs (Default)  5-10 Lacs  10-25 Lacs  25 Lacs - 1 Crore  > 1 Crore Net-worth  in ₹ as on  (Not older than 1 year) (Mandatory for Non-individuals)

Occupation Details (✓)  Private Service  Public Sector / Govt. Service  Business  Professional  Housewife  Retired  Student  Forex Dealer  Agriculturist  Others \_\_\_\_\_ (Please specify)

## 2. Others (✓)

For Individuals  Politically Exposed Person  Related to Politically Exposed Person  Not Applicable

For Non-Individuals **Is the entity involved in any of the following services**  
 (i) Foreign Exchange/Money Changer Services  Yes  No (ii) Gaming/Gambling/Lottery/Casino Services/Betting Syndicates  Yes  No  
 (iii) Money Lending/Pawning  Yes  No

(Politically Exposed Persons (PEP) are defined as individuals who are or have been entrusted with prominent public functions in a foreign country e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/military officers, senior executives of state owned corporations, important political party officials etc.)

## 3. FATCA Declaration

Country of Birth /Citizenship/Nationality or Tax Residency, other than India, for any applicant:  Yes  No (Mandatory to ✓)  
 If Yes, please fill FATCA/ CRS declaration

NRI investors should mandatorily fill separate FATCA/CRS declarations. Non-individuals investors should mandatorily fill separate FATCA / CRS & UBO declarations.

## 4. Bank Details

Bank Name\*  Branch

Bank City  PIN

A/c No\*  A/c Type\*

MICR Code (9 Digit)  IFSC Code (11 Digit)

\* Mandatory

## Acknowledgement Slip

We acknowledge the receipt of the request for change of status from minor to major from Mr. / Ms. / M/s. \_\_\_\_\_

in Folio No.  with Invesco Mutual Fund (Subject to scrutiny and verifications.)




Date of receipt at Karvy / AMC

Karvy / AMC Seal

**5. Nomination Details** (Mandatory for investors who opt to hold units in non-demat form)

	Name	Relationship																			
Nominee 1	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>																			
	Date of Birth (for minor)	Nominee PAN																			
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Nominee 2	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>																			
	Date of Birth (for minor)	Nominee PAN																			
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Nominee 3	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>																			
	Date of Birth (for minor)	Nominee PAN																			
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D	D	M	M	Y	Y	Y	Y														
	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>																			
	Name of Guardian (If Nominee is Minor)	Guardian's Relation (with the minor)																			
	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>																			
	Address	PAN of Guardian																			
	<input style="width:95%; height: 40px;" type="text"/>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> <td style="width:12.5%;"></td> </tr> </table>																			

I do not intend to nominate (✓ the box , in case you do not wish to nominate)

<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">  <p>Signature of First Holder (Major)</p> </div> <hr style="width:90%; margin: 0 auto;"/> <p>(Name)</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">  <p>Guardian's Attestation</p> </div> <hr style="width:90%; margin: 0 auto;"/> <p>(Registered Guardian's Name)</p>	<p>Or</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">  <p>Bank Attestation</p> </div> <hr style="width:90%; margin: 0 auto;"/> <p>(Branch Seal with Attester's Name and Employee Number)</p>
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**Documents attached :**

- New bank mandate where account changed from minor to major.
- Signature of the major should be attested by the Guardian on folio OR Manager of a scheduled bank / Bank Certificate/ Letter.
- KYC acknowledgement of the major.
- FATCA declaration of major.

**Attach Any one of following :**

- Cancelled cheque leaf for each of bank accounts to be registered (the name of bank account holder must be printed on the cheque leaf); or
- Copy of bank statement / pass book page showing account number, account holders' name and address, for each of bank account to be registered.

Please note:

(Originals of above documents should be produced for verification at the ISC or Official Points of Acceptance of Transactions of Invesco Mutual Fund and the original will be returned across the counter after verification.)

**Get in Touch**

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