

Date: / /

Sub: Change of Status from Minor to Major & updation of relevant information.

Investment Account No: _____

1) AMC _____ Folio No. _____ 2) AMC _____ Folio No. _____

3) AMC _____ Folio No. _____ 4) AMC _____ Folio No. _____

5) AMC _____ Folio No. _____

Investment(s) was made in mutual funds in the above Investment account when I was minor and the same was represented by _____ <Guardian Name>. As I have attained 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 all mutual funds held under the above referred investment account

	Investor Particulars Bank Particulars		Bank Particulars
PAN*		Bank Name*	
Email Id		Branch	
Mobile No.		A/c Type – A/c No*	
Tel – Off		Bank City	
Tel – Res		MICR Code (9 Digit)	
Tax Status*		IFSC Code (11 Digit)	

Signature of First Holder (Major)* _____ *Guardian's Name & Signature _____ *Bank Manager Signature _____

Documents attached:

Self-attested KYC acknowledgment copy*, Age Proof*, PAN card copy after Minor has attained (Majority)*, Cancelled Cheque with Name & Account number *printed on it.

Original Bank statement old & New A/c (Single A/c) / Copy of the Bank Statement showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager

Copy of Pass book showing A/c holder Name and A/c No. duly attested by the relevant Bank Manager (old & or after that date)

Some AMC's would require separate request addressed to them containing folio No & Scheme Name.

Date of this letter & KYC acknowledgement should be the date of attaining the age of majority or after that date.

*mandatory

For Bank Use

Date and time of Acceptance _____ Date of input _____

Receiver's stamp _____ Signature verified by _____

Signature verified by _____

Documents sent to CPC on _____ Authorized by _____

Acknowledgement Slip

We acknowledge the receipt of customer modification instruction type _____ from Mr. /Mrs. / Ms. _____ relating to customer relationship number _____ under Service request number _____

Date: / /

Bank Official
For **Kotak Mahindra Bank Ltd.**,
(Sign and stamp)