Minor Attains Majority: Request Form to Update Details

The minor in whose name investments were done is a Major now!! Time to update details in the folio. Fill this form, attach documents and submit to us. All details and documents in the form are mandatory.

Folio Nos.

Minor's Name in the folio

Guardian's Name in the folio

Having completed age of 18 years, the erstwhile minor has become a major. I request JioBlackRock Mutual Fund to transfer the Units in the name of the Major Unit holder independently, with details as mentioned below.

Hereunder, please mention details of erstwhile minor who has turned Major now.

DOB D D M M Y Y Y Y PAN / PEKRN ☐ KYC (Mandatory)

Tax Status ☐ Resident Individual ☐ NRI (Non-Repatriable)

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1. Additional KYC Details

a. Occupation Details (Please tick ✓)

☐ Private Sector Service ☐ Public Sector Service ☐ Government Service ☐ Business ☐ Professional ☐ Agriculturist ☐ Retired
☐ Housewife ☐ Student ☐ Forex Dealer ☐ Others (Please specify) _____

b. Gross Annual Income ☐ Below 1 Lac ☐ 1-5Lacs ☐ 5-10Lacs ☐ 10-25Lacs ☐ 1>25 Lacs-1 crore ☐ >1 crore

c. Others (Please tick ✓) ☐ Politically Exposed Person (PEP) ☐ Related to a Politically Exposed Person (PEP) ☐ Not Applicable

Contact Details:

Mobile No. Email ID

Mobile No. provided pertains to: Please tick (✓)
☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings
☐ Dependent Parents ☐ Guardian ☐ PMS ☐ Custodian ☐ POA

Email ID provided pertains to: Please tick (✓)
☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Siblings ☐ Dependent Parents
☐ Guardian ☐ PMS ☐ Custodian ☐ POA

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2. CORRESPONDENCE ADDRESS OF 1st APPLICANT (As per KYC records) (NRI Investors should mention their overseas address)

City State

Country Pincode

Type of address given at KRA ☐ Residential ☐ Business ☐ Registered Office

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3. BANK ACCOUNT DETAILS

(Attach Original Cancelled Cheque of existing bank account and new bank account (with name & account number pre-printed) or copy should be produced for verification.)

Bank Name **Please provide Bank Account details proof.**

Account No. Account Type ☐ Savings ☐ Current ☐ NRE ☐ NRO ☐ FCNR ☐ Others_____

11 Digit IFSC Branch City

Please ensure the name in this application form and in your bank account are the same.

Attach any one of: ☐ Cancelled Cheque with name & account number pre-printed ☐ Latest Bank statement* ☐ Latest Pass book* ☐ Bank Letter*#
***should not be older than 3 months**

*#Bank Letter should be provided in original for verification or should be attested by the bank. Bank Letter or attestation should have bank manager's signature, name, designation, employee code, bank seal and contact number

Submit originals of any one of the documents mentioned above, or copy should be attested by the Bank or originals should be produced for verification. All supporting documents should clearly evidence the bank name, bank account number and names of all account holders.

ACKNOWLEDGEMENT SLIP - MINOR ATTAINS MAJORITY

Received, subject to verification and conditions.

JioBlackRock Mutual Fund

TIME STAMP HERE

Folio No.

Name of Investor

4. FATCA & CRS DETAILS FOR INDIVIDUALS

	Place / City of Birth	Country of Birth	Nationality	Are you a tax resident in any other country outside India?
Unit holder (erstwhile Minor, now Major)				☐ Yes## ☐ No

##If 'YES' please fill for ALL countries (other than India) in which you are a Resident for tax purpose i.e. where you are a Citizen / Resident / Green Card Holder / Tax Resident in the respective countries

	Country of Tax Residency	**Tax Identification Number or Functional Equivalent**	**Identification Type** (TIN or other please specify)	**If TIN is not available please tick (✓) the reason A, B or C (as defined below)**
Unit holder (erstwhile Minor, now Major)				Reason: ☐ A ☐ B ☐ C

Reason A - The country where the Account Holder is liable to pay tax does not issue Tax Identification Numbers to its residents.
Reason B - No TIN required (Select this reason Only if the authorities of the respective country of tax residence do not require the TIN to be collected)
Reason C - Others, please state the reason thereof:

5. NOMINATION DETAILS:

I / We hereby nominate the following person(s) who shall receive all the assets held in my / our account / folio in the event of my / our demise, as trustee and on behalf of my / our legal heir(s)

	Mandatory Details			**Optional Details**				
	Name of nominee	**Date of birth of nominee (if minor)**	**Relationship**	**Where Nominee is a minor, Guardian Name**	**Mobile Number***	**E-mail ID***	**Personal Identifier Document*****	**Share of Nominee (%) ** **
1								
2								
3								
	In case of each Minor as Nominee, please mention Guardian's relationship with Minor as Mother/Father/Legal Guardian.							Total 100%

* The aforesaid details shall be optionally provided for the Guardian, in case the nominee is a minor. Please note that the MF / RTA will be able to reach out to your nominee if you provide the contact details.
** If % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division /fraction of %, shall be transferred to the first nominee mentioned in the nomination form.
*** Provide only number: PAN or Driving Licence or Aadhaar (last 4 digits). Copy of the document is not required. However, in case of NRI / OCI/ PIO, Passport number is acceptable. Please note that the MF / RTA will be able to reach out to your nominee if you provide the details.

I / We want the details of my / our nominee to be printed in the statement of holding, provided to me/ us by the JioBlackRock AMC as follows; (please tick (✓), as appropriate)

☐ Name of nominee(s) **OR** ☐ Nomination Registered: (If neither option or both options are selected, the default will be set to Nomination Registered)

☐ **OPT-OUT declaration**: 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) mentioned here in below :

I / We understand that - (i)the nomination helps to quickly identify the person for transfer of securities and helps in faster and smoother transmission of my securities to my legal heir(s) after my demise. (ii) in the absence of a nomination, my legal heir(s) may require the submission of certain additional legal or court-issued documents which may delay the process of transmission of securities to my legal heir(s). (iii) if no claim is made on the account / folio for a prolonged period after my demise, the holdings may be treated as unclaimed assets and they may be transferred to Investor Education and protection Fund Authority (IEPF) in accordance with the applicable regulatory framework. I confirm that I have understood the above implications and that my decision to opt out of nomination is voluntary.

Email: **service@jioblackrockamc.com** Website: **www.jioblackrockamc.com**
Contact Center no.: **+91 22-3520 7700 / +91 22-6998 7700** (Monday-Friday, 9 am - 6 pm & Sat, 9 am - 1 pm)

- Investors can provide, changes or cancel nominations any number of times.
- The signature of all the joint holders shall be obtained for providing / changing nomination regardless of mode of operations.
- This nomination shall supersede any prior nomination made by the investor(s), if any.
- Investor have the right to receive acknowledgement of the nomination form for each instance of nomination / subsequent change.

For complete details about nomination, please refer to Statement of Additional Information (SAI).

On providing email-id investors shall receive the scheme-wise annual report or an abridged summary account statements / statutory and other documents by email. However, if the investors wish to receive physical copy of the scheme wise annual report or an abridged summary thereof (Please tick (✓) Opt-in ▢)

Guardian Signature	Signature of Unit holder (erstwhile Minor, now Major)
Guardian's Signature	Name: _____ & Signature

Alternatively, please attach banker's certification / attestation in the prescribed form as per Annexure 1a in the absence of Guardian signature.

Investors should retain the acknowledgement evidencing submission of the transaction till they receive a confirmation of acceptance or rejection of transaction. In case of difference of details in acknowledgement vis-à-vis actual transaction document, the details as mentioned on transaction document will prevail.

Wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses (name and address) shall be duly provided in this form.

Witness 1 - Name & Address	Witness 2 - Name & Address
Witness 1 - Signature	Witness 2 - Signature

BANK ATTESTATION OF ACCOUNT DETAILS & ACCOUNT-HOLDER'S SIGNATURE

ANNEXURE 1

(To be issued on the Bank's Letter Head OR This form itself with Bank Official's name, designation (Bank Manager), Employee code, contact no. mentioned & Bank seal affixed in the space below)

Date: D D M M Y Y Y Y

TO WHOMSOEVER IT MAY CONCERN

This is to certify that Mr. / Ms. _____ is a customer of our bank,

namely, Name of the bank

branch having the following:

Bank Account:

Account number

A/C type ☐ Savings ☐ Current ☐ NRO ☐ NRE ☐ NRNR ☐ Others (Please specify)

9-Digit MICR No. 11-Digit IFSC

His / her address, as per our Bank records, is as follows:

City State PIN

SIGNATURE VERIFICATION BY BANKERS

Signature of the above customer in the box alongside, verified & validated with his / her specimen signature as per Bank's records

Signature of the client

Signature of the bank official with Bank's Seal

Name of the attesting Bank Official* (Bank Manager)

Designation* Employee Code*

Telephone Number*

(*Mandatory)