

1. My Details (Mandatory) to be filled in block letters

Folio No.

Name Mr. / Ms. / M/s.

PAN

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			☐ Indian ☐ U.S. ☐ Others	Please Specify
Second Applicant			☐ Indian ☐ U.S. ☐ Others	Please Specify
Third Applicant			☐ Indian ☐ U.S. ☐ Others	Please Specify

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				Reasons ☐ A ☐ B ☐ C
Second Applicant				Reasons ☐ A ☐ B ☐ C
Third Applicant				Reasons ☐ A ☐ B ☐ 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**

Please refer to the instructions provided below before completing the form -

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.