

Investment Services Account – Conversion of Minor to Major

Date: _____

Sub: Conversion of MINOR TO MAJOR

Request you to update the change in tax status from MINOR to MAJOR for my holdings in ISA account held with HDFC Bank Ltd (Currently held in Minor/Guardian Capacity)

Request you to please

- 1) Update the change in Tax status: Minor to Major
- 2) Update the name of the Major as _____
Reason : _____
- 3) Update the Major PAN number: _____
- 4) Update the New Bank Account number if any
- 5) Update the new Address & contact details as mentioned below
- 6) List of Folios:- Please refer Annexure 1

Minor Investment Services Account No.: _____

Default Bank Account No linked to Minor ISA: _____

Account Type linked to Minor ISA A/C : ☐ Resident ☐ Current ☐ Savings
☐ NRE ☐ NRO

Bank A/c Holding Pattern: ☐ Single ☐ Either or Survivor

New Default Bank Account No: _____

New Account Type : ☐ Resident ☐ Current ☐ Savings
☐ NRE ☐ NRO

Bank A/c Holding Pattern: ☐ Single ☐ Either or Survivor

First holder old mailing address / Contact Details

City _____ Pin Code* _____

Country _____ Zip Code* _____

Email Id : _____

**First holder new mailing address / Contact Details
(Address Proof Attached)**

City _____ Pin Code* _____

Country _____ Zip Code* _____

Email Id : _____

Email Id belongs to:

- ☐ SE-Self ☐ SP-Spouse ☐ DC-Dependent Children
☐ DS-Dependent Siblings ☐ DP-Dependent Parents ☐ GD-Guardian

Phone : (O) _____ (R) _____

(M) _____

Mobile Number belongs to:

- ☐ SE-Self ☐ SP-Spouse ☐ DC-Dependent Children
☐ DS-Dependent Siblings ☐ DP-Dependent Parents ☐ GD-Guardian

Name of Investment Services Account Holders

(Guardian Name) (Major Name) _____

Signature of Investment Services Account Holders

(Guardian Signature) (Major Signature) _____

Name of Existing Bank Account Holders

1st Holder _____

2nd Holder _____

3rd Holder _____

Signature of Existing Bank Account Holders

Name of Proposed Bank Account Holders

1st Holder _____

2nd Holder _____

3rd Holder _____

Signature of Proposed Bank Account Holders

Signature verified by RM: Y N

Advisor Sign _____ Advisor Name _____ Advisor Employee Code _____

Annexure 1

List of Folios

| Sr.No | AMC Name | Folio Number |
|-------|----------|--------------|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | | |
| 13 | | |
| 14 | | |
| 15 | | |

First holder
Signature of Investment Services Account Holders

Second holder

Third holder

First holder
Name of Investment Services Account Holders

Second holder

Third holder

Documentation for Minor to Major change

Identity Proof -- Any of the below with self-attestation and OSV done by the RM.

- I. PAN Card Copy
- II. ELECTION VOTER ID
- III. DRIVING LICENCE
- IV. GOVT ISSUED ID CARD WITH PHOTO AFFIXED.
- V. BANK PASSBOOK COPY WITH PHOTO AFFIXED
- VI. PASSPORT COPY

Following documents are required for change of tax status from Minor to Major

- 1) New Bank A/c cancelled cheque with pre-printed name along with tax status mentioned on the Cheque or BANK STATEMENT and Bank letter with customer's tax status mentioned and branch manager's attestation.
- 2) In case of change in Bank A/c, please provide old & new cancelled Cheque copy
- 3) Pan card copy
- 4) KYC status printout
- 5) FATCA declaration completely filled form

*******NOTE-- Provide a separate request for Nominee updation -mandatory**