

Investment Services Account – Conversion of Tax Status & Change in Bank Account linkage form

Date: _____

Sub: Change of tax status from _____ to _____

Request you to change the tax status from _____ to _____ for my holdings in ISA account held with HDFC Bank Ltd

Request you to please

- 1) Update the change in Tax status
- 2) Update the New alt folio (New resident ISA account number held with HDFC Bank Ltd)
- 3) Update the New Bank Account number
- 4) Update the new Address & contact details as mentioned below
- 5) Consolidate the folio numbers where ever applicable
- 6) List of Folios:- Please refer Annexure 1

Details for the above Updation is mentioned below for necessary actionPlease arrange to link my holdings as per the new tax status to the new ISA mentioned below:

New Investment Services Account No.: _____

Old Default Bank Account No: _____ Old ISA No: _____

Old Account Type : ☐ Resident ☐ Current ☐ Savings
☐ NRE ☐ NROBanc A/C Holding Pattern: ☐ Single ☐ Either or Survivor

New Default Bank Account No: _____

New Account Type : ☐ Resident ☐ Current ☐ Savings
☐ NRE ☐ NROBanc 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* _____
(For NRI's)

Email Id : _____
(Mandatory For NRI's)

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

List of Folios:- Please refer Annexure 1

Name of Investment Services Account Holders

Signature of Investment Services Account Holders

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	Second holder	Third holder
Signature of Investment Services Account Holders		

_____	_____	_____
First holder	Second holder	Third holder
Name of Investment Services Account Holders		



Documentation

- 1) Self-attested Address Proof**
- 2) Cancelled Cheque of the existing tax status (Old) and the New tax status bank account.**
- 3) The Name of the customer should be printed on the same Or Bank A/c statement with the Branch manager attestation**
- 4) Bankers letter with branch manager attestation**
- 5) Self-attested Passport copy.**
- 6) Self-attested PAN card copy**
- 7) FATCA**