

Supplementary KYC Information & FATCA-CRS Declaration - Individuals & HUF

(Please consult your professional tax advisor for further guidance on your tax residency, FATCA / CRS Guidance)

PAN*				FOLIO	NO. *if p	an is no	t requ	ired															
Name																			Gen	der			
Type of address given at KYC KRA Resid					ential Residential or Busines							Business					Registered Office						
Place of Birth	ace of Birth																						
Country of Birth																							
Nationality																							
Gross Annual Income Details	Below 1 Lakh			5 -	10 Lacs		25 Lacs- 1 Crore						Net Worth in INR. In Lakhs										
in INR	1 - 5 Lacs			10	- 25 Lacs		> 1 Crore						Net Worth as on D D M M Y Y Y Y										
Occupation Details	Business Pro			Profession	al	Pu	Public Sector Housewi					ife	Retired						Others[Please specify]				
Details	Private Sec	rnment Se	rvice	gricul	turist Student					Forex Dealer													
Politically Exposed Person [PEP]					Yes Related to I)	Not Applicable										
Are you a tax resident of any country other than India?																							
If yes	, please indi	icate all	countri	es in whic	ch you ar	e resid	dent	for ta	x pu	rpose	s and	the a	ssoc	iated									
Country					Tax Identification Number									Identification Type (TIN or Other, please specify)									
To also include USA, where the individual is a citizen / green card holder of The USA																							
In case Tax Identification Number is not available, kindly provide its functional equivalent \$																							
Certification										Signature													
I / We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I / We also confirm that I / We have read and understood the FATCA & CRS Terms and Conditions below and																							
hereby accept the same.								Da ⁱ Pla															
For investor conver	 For investor convenience, Karvy Computershare is collecting this mandatory information for updating across all participating Karvy Serviced Mutual												Mutual										

For investor convenience, Karvy Computershare is collecting this mandatory information for updating across all participating Karvy Serviced Mutual Funds (list in the cover email / letter) where you are already an investor or would become an investor in future.

Please submit the form duly filled, signed, for all the holders, separately, and submit at your nearest Karvy Computershare branch or you can dispatch the hard copy to -

Karvy Computershare Pvt. Ltd., Karvy Selenium Tower B Unit - FATCA / CRS / UBO Plot Nos. 31 & 32 | Financial District | Nanakramguda Serilingampally Mandal | Hyderabad - 500032 | India

FATCA & CRS Terms & Conditions

Details under FATCA & CRS: The Central Board of Direct Taxes has notified Rules 114F to 114H, as part of the Income-tax Rules, 1962, which Rules require Indian financial institutions such as the Bank to seek additional personal, tax and beneficial owner information and certain certifications and documentation from all our account holders. In relevant cases, information will have to be reported to tax authorities / appointed agencies. Towards compliance, we may also be required to provide information to any institutions such as withholding agents for the purpose of ensuring appropriate withholding from the account or any proceeds in relation thereto.

Should there be any change in any information provided by you, please ensure you advise us promptly, i.e., within 30 days.

It is important that you respond to our request, even if you believe you have already supplied any previously requested information.