



TAX STATUS CHANGE REQUEST FORM

1st Floor, Apeejay House, 3 Dinshaw Vachha Road, Backbay
Reclamation, Churchgate, Mumbai - 400020 | www.QuantumAMC.com

1. Investor and Investment details Please ✓ wherever applicable.

Name of the Investor
PAN No. Folio No.

2. Change in Tax Status

Resident Individual to Non Resident Individual Non Resident Individual to Resident Individual

3. Overseas Address (Mandate for change status from RI to NRI)

Address _____
City _____ State _____ Country _____ Zip code _____

4. Bank Details

A/c Type [please ✓] SB Current NRO NRE FCNR
Bank Name IFSC MICR Code
Account No Branch City Pin Code

*Mandatory - Please attach either a Cancelled Cheque with first applicant name and account number pre-printed on the face of the cheque or a Bank statement/certified bank passbook or a bank letter/Certificate duly signed by Bank Branch Manager/ Authorized Personnel.

5. FATCA Details

Please indicate all Countries in which you are a resident for tax purpose, associated Tax payer Identification Number and it's Identification type eg. TIN etc.

Sole/First Applicant/Guardian			2nd Applicant			3rd Applicant		
Country#	Tax Payer Ref ID No	Identification Type (TIN or other, please specify)	Country#	Tax Payer Ref ID No	Identification Type (TIN or other, please specify)	Country#	Tax Payer Ref ID No	Identification Type (TIN or other, please specify)
1.								
2.								
3.								
Country of Birth			Country of Birth			Country of Birth		
Country of Nationality			Country of Nationality			Country of Nationality		

In case Country of Tax Residence is only India then details of Country of Birth & Nationality need not be provided. In case Tax Identification Number is not available, kindly provide its functional equivalent

*Please indicate all countries, other than India, in which your are a resident for tax purpose, associated Taxpayer Identification Number & Its Identification type e.g: TIN etc

6. Signatures

Signature(s) _____ Date Place _____

Sole/1st Applicant/Guardian/Authorised Signatory	2nd Applicant / Authorised Signatory	3rd Applicant / Authorised Signatory
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Note: Investors need to update the tax status with KYC also.