



Family Mapping Form

I / We, the below mentioned customer / customers of Tata Capital Wealth are a part of one Family.

Sr. No.	Wealth ID	Name of the customer	Relationship with Authorised Person	PAN Details

I / We hereby authorise the below person, also being an existing customer of Tata Capital Wealth.

Sr. No.	Wealth ID	Name of Authorised Person being member of the Family	PAN Details

We agree on showing the following as part of family mapping to the Authorised Person

- Individual and consolidated dashboard, portfolio analytics, other portfolio related reports of all family members
- Individual and consolidated Transaction report, Profit / Loss report, corporate action and other related reports of all family members
- Individual and consolidated Investment Maturities, Insurance reports and other related reports of all family members
- All future developments on the portal related portfolios and related reports of individuals and members of the family

Declaration:

1. I / We understand that Tata Capital Financial Services Limited ("TCFSL") is registered with The Association of Mutual Funds in India as a Mutual Fund Distributor bearing ARN No.84894 and Tata Capital Wealth is a service offering by TCFSL.
2. I / We understand that the family mapping is an additional feature offered by Tata Capital Wealth and that the same is not mandatory to avail.
3. I / We hereby give my consent voluntarily and authorise Tata Capital Wealth to allow the above named family member authorised by me / us to view my portfolio.
4. I / We agree that above information is only for mapping of families and does not include any transactional details.
5. I / We agree that Tata Capital Wealth have explained me / us the benefits of family mapping and that I / we have understood the same.

TATA CAPITAL FINANCIAL SERVICES LIMITED

AMFI-registered Mutual Fund Distributor bearing ARN 84894

Corporate Identity Number : U67100MH2010PLC210201 | www.tatacapital.com

Registered Office 11th Floor, Tower A, Peninsula Business Park, Ganpatrao Kadam Marg, Lower Parel, Mumbai 400013



Signatures: Name of the family member	Signature
(Authorised Person of the family)	(Signature of Authorised Person of the Family)
(Family Member)	(Signature of Family member)
(Family Member)	(Signature of Family member)
(Family Member)	(Signature of Family member)
(Family Member)	(Signature of Family member)

 Signature of RM Wealth Manager

Date :

Place :

Signature
RM Name
EMP Code

TATA CAPITAL FINANCIAL SERVICES LIMITED

AMFI-registered Mutual Fund Distributor bearing ARN 84894

Corporate Identity Number : U67100MH2010PLC210201 | www.tatacapital.com

Registered Office 11th Floor, Tower A, Peninsula Business Park, Ganpatrao Kadam Marg, Lower Parel, Mumbai 400013