

Customer Information Updation Form

To,
Tata Capital Wealth
Customer Support Team,

I _____ currently having
Wealth ID _____ request to change the following details in my Wealth account.

I wish to change my mailing address as below

Contact Address: (Kindly provide proof of the new mailing address along with this form.)

Correspondence Address

Building / Flat No/Colony _____ Area/ Road: _____

_____ City: _____

Landmark: _____

Pin code: _____ State: _____ Country: _____

Permanent Address

Building / Flat No/Colony _____ Area/ Road: _____

_____ City: _____

Landmark: _____

Pin code: _____ State: _____ Country: _____

Proof of Address: (Tick against the selected option. Refer checklist)

Passport (Expiry Date) _____ (DD/MM/YYYY) Driving License (Expiry Date) _____ (DD/MM/YYYY) Voter I.D.

Others _____

(Refer checklist as below)

Proof of Address (POA): - List of documents admissible as Proof of Address:

(*Documents having an expiry date should be valid on the date of submission.)

1. Passport/ Voters Identity Card/ Ration Card/ Registered Lease or Sale Agreement of Residence/ Driving License/ Flat Maintenance bill/ Insurance Copy.
2. Utility bills like Telephone Bill (only land line), Electricity bill or Gas bill - Not more than 3 months old.
3. Bank Account Statement/Passbook -- Not more than 3 months old.
4. Self-declaration by High Court and Supreme Court judges, giving the new address in respect of their own accounts.
5. Proof of address issued by any of the following: Bank Managers of Scheduled Commercial Banks/Scheduled Co-Operative Bank/Multinational Foreign Banks/Gazetted Officer/Notary public/Elected representatives to the Legislative Assembly/Parliament/Documents issued by any Govt. or Statutory Authority.
6. Identity card/document with address, issued by any of the following: Central/State Government and its Departments, Statutory/Regulatory Authorities, Public Sector Undertakings, Scheduled Commercial Banks, Public Financial Institutions, Colleges affiliated to Universities and Professional Bodies such as ICAI, ICWAI, ICSI, Bar Council etc., to their Members.

TATA CAPITAL FINANCIAL SERVICES LIMITED

AMFI-registered Mutual Fund Distributor bearing ARN No. 84894

Corporate Identity Number : U67100MH2010PLC210201 | www.tatacapital.com

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

I wish to update my contact details as below

Previous

Email ID _____

Mobile No: _____

Landline No : _____

New

Email ID _____

Mobile No: _____

Landline No : _____

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.

I/We declare that all the details furnished in this form are true, correct and up-to-date in all respects and that I/We have not withheld any information whatsoever. I / We undertake to inform TCFSL of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I/we am /are aware that I may be held liable for it.

I / We hereby consent to TCFSL to carry out the KYC and other requisite checks by such processes as may be permissible under law including authentication/verification of documents or details submitted for KYC purpose, accessing and procuring data from databases maintained by statutory or other authorities constituted by law.

I/We hereby consent to voluntarily submit to TCFSL at my /our own discretion, the physical copy of Aadhaar card / physical e-Aadhaar / offline electronic adhaar xml as issued by the Unique Identification Authority of India ("UIDAI") after masking the Aadhaar number for the purpose of establishing my / our identity / address proof in line with the Directions / guidelines issued by the Regulatory and Statutory bodies from time to time. I / We further give my / our consent to TCFSL for verification of my / our Aadhaar to establish the genuineness in such manner as permitted by UIDAI or under any law from time to time. The consent and purpose of collecting Aadhaar has been explained to me / us in local language. TCFSL has informed me / us that my / our Aadhaar submitted to TCFSL shall not be used for any other purpose other than as per the requirements of law. (applicable in case customer submits Aadhaar for address proof)

 Customer Signature:

Date :

Place :

Name

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