Pursuant to SEBI Circular No. SEBI/HO/IMD/DF3/CIR/P/2019/166 dated December 24, 2019 the following uniform process shall be applicable for investments made in the name of minor through a guardian. This notice cum addendum sets out changes in Scheme Information Documents (SIDs) of all schemes of Tata Mutual Fund & Statement of Additional Information (SAI) of Tata Mutual Fund.

a. Payment for investment by means of Cheque, Demand Draft or any other mode shall be accepted from the bank account of the minor or from a joint account of the minor with the guardian only. For existing folios, investors are requested to submit Form for change of Pay-out Bank account details along with the required documents before opting for redemption.

b. Upon the minor attaining the status of major/attaining 18 years of age, the minor in whose name the investment was made, shall be required to complete the CKYC process and provide PAN, all the KYC details, FATCA details, updated bank account details including cancelled original cheque leaf with the name of major printed over it and by filling up a prescribed “Minor attaining Major status form” available on our website. No further transactions shall be allowed till the status of the minor is changed to major.

c. Any instructions registered for Systematic Investment Plan (SIP), Systematic Transfer Plan (STP), Systematic Withdrawal Plan (SWP) etc. shall be suspended when the minor attains majority, till the status is changed to major.

d. The major may update Nomination in favour of an individual.

Notes:
- The above revision will be implemented prospectively & shall remain in force till further notice.
- This notice cum addendum will form an integral part of the SID/ SAI.
- All other terms & conditions of the SID/SAI including the Risk-o-meter & type of scheme read with other addendums if any remain unchanged.

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.