



FATCA-CRS Declaration - *Individuals*

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

SOLE/FIRST HOLDER DETAILS

PAN*

Name

Type of address given at KYC KRA Residential Residential or Business Business Registered Office

State

Phone No (with ISD Code)

Place of Birth

Country of Birth

Nationality

Are you a tax resident of any country other than India? Yes No

If yes, Please indicate all Countries, other than India, in which you are a resident for tax purpose, associated Taxpayer Identification Number and it's Identification type eg. TIN, GIIN, CIN, EIN, others, etc.

Country [#]	Tax Identification Number	Identification Type (TIN or Other, please specify)

SECOND HOLDER DETAILS

PAN*

Name

Type of address given at KYC KRA Residential Residential or Business Business Registered Office

State

Phone No (with ISD Code)

Place of Birth

Country of Birth

Nationality

Are you a tax resident of any country other than India? Yes No

If yes, Please indicate all Countries, other than India, in which you are a resident for tax purpose, associated Taxpayer Identification Number and it's Identification type eg. TIN, GIIN, CIN, EIN, others, etc.

Country [#]	Tax Identification Number	Identification Type (TIN or Other, please specify)

THIRD HOLDER DETAILSPAN* Name Type of address given at KYC KRA Residential Residential or Business Business Registered Office State Phone No (with ISD Code) Place of Birth Country of Birth Nationality Are you a tax resident of any country other than India? Yes No

If yes, Please indicate all Countries, other than India, in which you are a resident for tax purpose, associated Taxpayer Identification Number and it's Identification type eg. TIN, GIIN, CIN, EIN, others, etc.

Country [#]	Tax Identification Number	Identification Type (TIN or Other, please specify)

DECLARATION & SIGNATURES

I/We acknowledge and confirm that the information provided above is/are true and correct to the best of my/our knowledge and belief and provided after necessary consultation with tax professionals. I/We have read and understood the information provided by me/us in this Form is true, correct and complete. I/We hereby authorize you [NJ AMC/NJ Fund/NJ India/Other group entities] to disclose, share, rely, remit in any form, mode or manner, all / any of the information provided by me, including all changes, updates to such information as and when provided by me to the Mutual Fund, its Sponsor, Asset Management Company, trustees, their group companies, any service provider including RTA or any Indian or foreign governmental or statutory or judicial authorities / agencies including but not limited to the Financial Intelligence Unit-India (FIU-IND), the tax / revenue authorities in India or outside India wherever it is legally required and other investigation agencies without any obligation of advising me/us of the same.

Sole/First Holder

Second Holder

Third Holder

Place: Date: **FATCA & CRS Terms & Conditions**

Details under FATCA & CRS : The Central Board of Direct Taxes has notified Rules 114F to 114H, as part of Income tax Rules, 1962 which Rules require Indian financial institutions such as the Investment Entity/Custodial Institution 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 Please note that you may receive more than one request for information if you have multiple relationships with NJ India Invest Private Limited or its group entities. Therefore , it is important that you respond to our request, even if you believe you have already supplied any previously requested information.



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