

### KYC DATA UPDATE FORM

Dear Sir/Madam, kindly amend my records with respect to my investment(s) in

#### A. INVESTMENT DETAILS

TICK	INVESTMENT TYPE	CONT-No.
	Halal Investment Fund	
	Halal Fixed Income Fund	
	Lotus Waqf Endowment Fund	
	Mudaraba Investment Plan	

Date 

D	D	M	M	Y	Y	Y	Y

#### B. PERSONAL INFORMATION \*

Title  Name

Gender  M  F Religion  City of Birth  Country of Birth

Date of Birth 

D	D	M	M	Y	Y	Y	Y

Phone Number  BVN  NIN

#### C. INFORMATION TO BE UPDATED \*

Tick and complete the change request option required

**CHANGE OF NAME**

New Name Surname  First Name  Other Names

Previous Name Surname  First Name  Other Names

Original Investment Certificate/Indemnity Form (for Halal Investment Fund)

**CHANGE OF CONTACT DETAILS**

Mobile Number  Email

Address

City  State/Country

**CORRESPONDENCE PREFERENCE:**

Would you like to receive SMS in addition to email Yes  No

**CHANGE OF DIVIDEND MANDATE**

Re-Invest  Pay to my bank account

**CHANGE OF BANK DETAILS**

Account Name

Bank Name

Account Number

#### C. TAX RESIDENCY SELF CERTIFICATION \*

Country of Residence  Tax Payer ID/Functional Equivalent

If Tax Payer ID/TIN is unavailable, please select a reason.

Reason A: My country of residence does not issue Tax Payer ID or functional equivalent to its residents.

Reason B: I am unable to obtain a Tax Payer ID or functional equivalent. (Please explain why)

Reason C: Local laws in my country of residence do not require the collection of the Tax Payer ID or functional equivalent.

Please explain in the box below why you are unable to obtain a Tax Payer ID or functional equivalent if you selected Reason B above

#### D. SIGNATORY AUTHORIZATION \*

#### PASSPORT PHOTO

Individual Applicant Signature  Joint Applicant Signature

Name  Name

#### REQUIRED DOCUMENTS FOR

##### Change of name

- Completed data update form
- Banker's Confirmation of signature letter issued by your bank
- Marriage certificate (if applicable);

- Newspaper publication
- Govt-issued ID card in the new name
- Sworn Affidavit

##### Change of address

- Completed data update form
- Government issued ID Proof of address (Utility bill with matching address not older than 3 months)