

# NOMINATION FORM FOR FRESH / CHANGE OF EXISTING NOMINATION



**Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders**

Please read the instructions carefully before filling up this form

Folio Number

**Sole / 1st Holder Details**

Name  PAN\*

**2nd Holder Details**

Name  PAN\*

**3rd Holder Details**

Name  PAN\*

I / We hereby nominate the following person(s) who shall receive all the assets held in my / our folio in the event of my / our demise, as trustee and on behalf of my / our legal heir(s) \*

**Name of the 1st Nominee\***  First Name  Middle Name  Last Name

**PAN of the Nominee<sup>§</sup>**  **Date of Birth of Nominee\*\***

**Nominee Relationship\***  **Share of Nominee (%)\***

**Name of the Guardian\*\***  **PAN of Nominee Guardian<sup>§</sup>**

**Guardian's Relationship with Nominee\*\***  Mother  Father  Legal Guardian

**Proof of relationship<sup>§</sup>**  Birth Certificate  School Leaving Certificate  Passport  Others

**Address<sup>§</sup>**

**City**  **State**  **Pincode**

**Name of the 2nd Nominee\***  First Name  Middle Name  Last Name

**PAN of the Nominee<sup>§</sup>**  **Date of Birth of Nominee\*\***

**Nominee Relationship\***  **Share of Nominee (%)\***

**Name of the Guardian\*\***  **PAN of Nominee Guardian<sup>§</sup>**

**Guardian's Relationship with Nominee\*\***  Mother  Father  Legal Guardian

**Proof of relationship<sup>§</sup>**  Birth Certificate  School Leaving Certificate  Passport  Others

**Address<sup>§</sup>**

**City**  **State**  **Pincode**

**Name of the 3rd Nominee\***  First Name  Middle Name  Last Name

**PAN of the Nominee<sup>§</sup>**  **Date of Birth of Nominee\*\***

**Nominee Relationship\***  **Share of Nominee (%)\***

**Name of the Guardian\*\***  **PAN of Nominee Guardian<sup>§</sup>**

**Guardian's Relationship with Nominee\*\***  Mother  Father  Legal Guardian

**Proof of relationship<sup>§</sup>**  Birth Certificate  School Leaving Certificate  Passport  Others

**Address<sup>§</sup>**

**City**  **State**  **Pincode**

Name(s) of holder(s)	Signature(s) of holder	Witness Name, Address and Signature*
Sole / First Holder (Mr./Ms.)		1.
Second Holder (Mr./Ms.)		2.
Third Holder (Mr./Ms.)		

\*Signature of two witness(es), along with name and address are required, if the account holder affixes thumb impression, instead of wet signature

\*Mandatory / <sup>§</sup>Optional / \*\*Mandatory & Applicable in case the Nominee is a Minor

**\*Joint Accounts:**

Event	Transmission of Folio to
Demise of one or more joint holder(s)	Surviving holder(s) through name deletion. The surviving holder(s) shall inherit the assets as owners.
Demise of all joint holders simultaneously – having nominee	Nominee
Demise of all joint holders simultaneously – not having nominee	Legal heir(s) of the youngest holder

1. Nomination shall be mandatory for single holding only. The requirement of nomination shall be optional for jointly held folios.
2. Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder cannot nominate.
3. Nomination is not allowed in a folio of a Minor unitholder.
4. The signatories for this nomination form in joint folios shall be the same as that of your joint MF folio i.e.
  - a. 'Either or Survivor' Folios - any one of the holder can sign.
  - b. 'Jointly' Folios - both holders have to sign.
5. A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee needs to be provided.
6. Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.
7. The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family, or a Power of Attorney holder.
8. A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
9. You can make nomination or change nominee any number of times without any restriction.
10. You are entitled to receive an acknowledgement from the AMC for each instance of providing or changing nomination.
11. Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single folio.
12. In case all your nominees do not claim the assets from the AMC, then the residual unclaimed asset shall continue to be with the AMC in case of MF units.
13. **Multiple Nominees:** Nomination can be made in favour of multiple nominees, subject to a maximum of three nominees. In case of multiple nominees, the percentage of the allocation/share should be in whole numbers without any decimals, adding upto a total of 100%. If the total percentage of allocation amongst multiple nominees does not add up to 100%, the nomination request shall be treated as invalid and rejected. If the percentage of allocation/ share for each of the nominee is not mentioned, the allocation /claim settlement shall be made equally amongst all the nominees.
14. Every new nomination for a folio shall overwrite the existing nomination, if any.
15. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio.
16. Nomination shall stand rescinded upon the transfer of units.
17. **Death of Nominee/s:** In the event of the nominee(s) pre-deceasing the unitholder(s), the unitholder/s is/are advised to make a fresh nomination soon after the demise of the nominee. The nomination will automatically stand cancelled in the event of the nominee(s) pre-deceasing the unitholder(s). In case of multiple nominations, if any of the nominee is deceased at the time of death claim settlement, the said nominee's share will be distributed equally amongst the surviving nominees.
18. **Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).**
19. The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
20. In respect of folios where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.