

Format for providing Nomination

Applicable for Individual Unitholders only
Please read the instructions carefully before filling up this form

I/We wish to make a nomination. <i>[As per details given below]</i>				
Nomination Details				
I/We wish to make a nomination and do hereby nominate the following person(s) who shall receive all the assets held in my / our account in the event of my / our death.				
Nomination can be made upto three nominees in the account.		Details of 1st Nominee	Details of 2nd Nominee	Details of 3rd Nominee
Mandatory Details				
1	Name of the nominee(s) (Mr./Ms.)*			
2	Share of each Nominee	Equally [If not equally, please specify percentage]	%	%
	<i>Any odd lot after division shall be transferred to the first nominee mentioned in the form.</i>			
3	Relationship With the Applicant (If Any)			
<i>* Date of Birth and Name of Guardian to be provided in case of minor nominee(s)</i>				
Non-mandatory Details				
4	Address of Nominee(s)/ Guardian in case of Minor City / Place: State & Country: Pincode			
5	Mobile / Telephone No. of nominee(s)/ Guardian in case of Minor			
6	Email ID of nominee(s)/ Guardian in case of Minor			
7	Nominee/ Guardian (in case of Minor) Identification details – [Please tick any one of the following and provide details of same] <input type="checkbox"/> Photograph & Signature <input type="checkbox"/> PAN <input type="checkbox"/> Aadhaar (masked – only last 4 digits visible) <input type="checkbox"/> Saving Bank account no. <input type="checkbox"/> Proof of Identity <input type="checkbox"/> Demat Account ID			
Signature(s) – As per mode of holding in demat accounts / MF Folio(s).				
		Name of the Holder	Signature / Thumb Impression of holder	
Sole / First Holder (Mr./Ms.)		Name:	Signature /Thumb Impression:	
		Witness 1 Name & Address:	Witness 1 Signature:	
		Witness 2 Name & Address:	Witness 2 Signature:	

Second Holder (Mr./Ms.)	Name:	Signature /Thumb Impression:
	Witness 1 Name & Address:	Witness 1 Signature:
	Witness 2 Name & Address:	Witness 2 Signature:
Third Holder (Mr./Ms.)	Name:	Signature /Thumb Impression:
	Witness 1 Name & Address:	Witness 1 Signature:
	Witness 2 Name & Address:	Witness 2 Signature:

** Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature.*

Note:

This nomination shall supersede any prior nomination made by the account holder(s), if any.

The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)

Instructions

1. The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
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. If the units are held jointly (i.e., in case of multiple unitholders in the folio), all joint holders need to sign the Nomination Form (even if the mode of holding/operation is on "Anyone or Survivor" basis).
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. **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.
10. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
11. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
12. Nomination shall stand rescinded upon the transfer of units.
13. **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.
14. 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).
15. The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
16. In respect of folios/accounts 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.
