

Form for Fresh Nomination / Change of Existing Nomination/ Opt-Out of Nomination



Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders.
Use separate form/s in case of multiple folios having different mode of holding.

Sponsor: Edelweiss Financial Services Limited. **Trustee Company:** Edelweiss Trusteeship Company Limited. **Investment Manager:** Edelweiss Asset Management Limited.
Edelweiss House, 10th Floor, Off C.S.T. Road, Kalina, Santacruz (E), Mumbai 400098, Maharashtra. **Website:** www.edelweissmf.com

Please read the instructions carefully before filling up this form

Date :

Name of 1st Holder	
Name of 2nd Holder	
Name of 3rd Holder	

I/We, the above named Unitholders of **Edelweiss** Mutual Fund, do hereby

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

Folio No. / Application No.	
1.	2.
3.	4.

Nominee Details * (Mandatory)	
Name of First Nominee	
Nominee's relationship with the Investor	Allocation**
Mobile No.*	Email*
Address	
Identity Number***	Date of Birth
Guardian Details****	
Name of Second Nominee	
Nominee's relationship with the Investor	Allocation**
Mobile No.*	Email*
Address	
Identity Number***	Date of Birth
Guardian Details****	
Name of Third Nominee	
Nominee's relationship with the Investor	Allocation**
Mobile No.*	Email*
Address	
Identity Number***	Date of Birth
Guardian Details****	

** If % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division/fraction of %, shall be transferred to the first nominee mentioned in the nomination form.

*** Provide only number: PAN or Driving Licence or Aadhaar (last 4). Copy of the document is not required. However, in case of NRI/OCI/PIO, Passport number is acceptable.

**** to be furnished only in following conditions / circumstances:

- Date of Birth (DOB): please provide, only if the nominee is minor.
- Guardian Details: It is optional for you to provide, if the nominee is minor.

	Name(s) of holder(s)	Name & Address of Witness	Witness Signature#
Sole / First Holder (Mr./Ms.)			
Second Holder (Mr./Ms.)			
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.

- I/We want the details of my/our nominee/s to be printed in the statement of holding, provided to me/us by the AMC as follows; (please tick any one, as appropriate)
☐ Name of nominee(s) ☐ Nomination: Yes / No
- This nomination shall supersede any prior nomination made by me / us, if any.

☐ I/We DO NOT wish to nominate

Declaration & Signature(s) (to be signed as per the mode of holding in respective folio)		
I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our MF Folio/ and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my / our MF Folio / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio / Demat account.		
Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder