



Applicable for Individual Unitholders only (effective from June 01, 2025 to August 31, 2025). Please read the instructions carefully before filling up this form.

Please fill in your Folio No.

MY FOLIO NO(S) [X X X X X X X X]

having same mode of holding and pattern.

INVESTOR NAME [X X X X X X X X]

Please fill in all relevant details of Nominee

I/We wish to make a nomination. [As per details given below]

Nomination Details

I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my / our account in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any.

Table with 4 columns: Nomination can be made upto three nominees in the account, Details of 1st Nominee, Details of 2nd Nominee, Details of 3rd Nominee

Mandatory Details

Main nomination details table with columns for Name, Share, Date of Birth, Relationship, Identification, Address, Mobile, and Email for three nominees.

Please tick and fill relevant details for required portion only.

Non-Mandatory Details

Table for Non-Mandatory Details including Nominee Guardian Name.

I / We want the details of my / our nominee to be printed in the statement of holding, provided to me / us by the AMC / DP as follows; (please tick, as appropriate) [X] Name of nominee(s) with % [] Nomination: Yes / No (Default)

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

Signature(s) - As per mode of holding in demat accounts / MF Folio(s).

Signature table with columns for Sole / First Holder, Second Holder, and Third Holder, and a row for Signature / Thumb Impression.

Signature of all holders are required.

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

Witness details table with columns for Witness 1 Name & Address, Witness 2 Name & Address, Witness 1 Signature, and Witness 2 Signature.

Signature of all Witness are required.

Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form. Note: The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)

Please tick and fill relevant details for required portion only.



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MY FOLIO NO(S)

having same mode of holding and pattern.

INVESTOR NAME

| | | | |
|--|---|---|---|
| I/We wish to make a nomination. [As per details given below] | | | |
| Nomination Details | | | |
| I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my / our account in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any. | | | |
| Nomination can be made upto three nominees in the account. | Details of 1st Nominee | Details of 2nd Nominee | Details of 3rd Nominee |
| Mandatory Details | | | |
| Name of the nominee(s) (Mr./Ms.)* | | | |
| Share of each Nominee | % | % | % |
| Date of Birth (for Minor) | D D / M M / Y Y | D D / M M / Y Y | D D / M M / Y Y |
| Relationship with the Applicant (select one) | <input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____ | <input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____ | <input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____ |
| Nominee/ Guardian (in case of Minor) Identification details [Please tick any one of the following and provide ID Number and no copies required]. | <input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____ | <input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____ | <input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked last 4 digits) **** * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____ |
| Address of Nominee(s)/ Guardian in case of Minor City / Place: State & Country: Pincode | | | |
| Mobile/Telephone No. of nominee(s)/Guardian in case of Minor | | | |
| Email ID of nominee(s)/ Guardian in case of Minor | | | |
| Non-Mandatory Details | | | |
| Nominee Guardian Name (in case Nominee is Minor) | | | |
| I / We want the details of my / our nominee to be printed in the statement of holding, provided to me / us by the AMC / DP as follows; (please tick, as appropriate) <input type="checkbox"/> Name of nominee(s) with % <input type="checkbox"/> Nomination: Yes / No (Default) | | | |
| This nomination shall supersede any prior nomination made by the account holder(s), if any | | | |
| Signature(s) – As per mode of holding in demat accounts / MF Folio(s). | | | |
| | Sole / First Holder (Mr./Ms.) | Second Holder (Mr./Ms.) | Third Holder (Mr./Ms.) |
| Signature / Thumb Impression | | | |
| * Signature of two witness(es), along with name and address are required, if the account holder affixes thumb impression, instead of wet signature. | | | |
| *Witness 1 Name & Address | | *Witness 2 Name & Address | |
| *Witness 1 Signature | | *Witness 2 Signature | |

Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form.
Note: The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)