

Nomination Form

For Registration / Modification / Cancellation of Nominees / Opt out of Nomination
(for Individual Unit Holders only)

Folio No.

Date

Format for providing Nomination

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 1 st Nominee	Details of 2 nd Nominee
Mandatory Details		Details of 3 rd Nominee	
1.	Name of the nominee(s)* (Mr./Ms.)		
2.	Share of each Nominee Equally [If not equally, please specify percentage]	☐ 100% ☐ 75% ☐ 50% ☐ 34% ☐ 25% ☐ Others (Please specify)	☐ 100% ☐ 75% ☐ 50% ☐ 33% ☐ 25% ☐ Others (Please specify)
Any odd lot after division shall be transferred to the first nominee mentioned in the form.			
3.	Relationship with the Applicant (If any)	☐ Father ☐ Mother ☐ Spouse ☐ Son ☐ Daughter ☐ Others (Please specify)	☐ Father ☐ Mother ☐ Spouse ☐ Son ☐ Daughter ☐ Others (Please specify)
4.	Date of Birth (mandatory in case of Minor)		
5.	Guardian name (non mandatory)		
6.	Identification number (PAN, Driving Licence, Aadhaar no. <last 4 digits>/Passport-must be provided for NRIs/OCIs)	☐ PAN ☐ Aadhaar ☐ Driving Licence ☐ Passport ID number	☐ PAN ☐ Aadhaar ☐ Driving Licence ☐ Passport ID number
7.	Address of Nominee(s)/ Guardian in case of Minor		
	City / Place:		
	State & Country:		
	PIN:		
8.	Mobile No. of nominee(s)/ Guardian in case of Minor		
9.	Email ID of nominee(s)/ Guardian in case of Minor		

Note: ¹ Nomination details provided would over-ride any previous nomination registered in the folio. ² Please ensure that sum of allocation% across all nominees in the folio adds up to exactly 100%.

I / We want the details of my / our nominee to be printed in the statement of holding, provided to me/ us by the AMC as follows; ☐ Name of nominee(s) ☐ Nomination: Yes / No			
	Name(s) of holder(s)	Signature(s) of holder	Witness Signature*
Sole / First Holder	(Mr./Ms.)		
Second Holder	(Mr./Ms.)		
Third Holder	(Mr./Ms.)		

(to be signed as per mode of holding in the folio)

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

Request for ☐ Registration ☐ Modification ☐ Cancellation of Nominees ☐ Opt out of Nomination

Folio No.

Date:

Name

PAN

Signature, Stamp & Date

Declaration for opting-out of nomination



☐ I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our MF Folio/ demat account 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.

Name of Holder(s)*			
Signature of Holder(s)*			

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