motilal oswal
Mutual Fund

Form for Fresh Nomination / Opt-out

Applicable for Individual Unitholders only (Single/Joint).
Please read the instructions carefully before filling up this form.

Folio Number(s)

Name of 1st Holder

Name of 2nd Holder

Name of 3rd Holder

☐ I/We wish to nominate ☐ I/We do not wish to nominate

Nominee Name*	Identity Number (last 4 digits) *	Nominee DOB / Relationship with primary unitholder*	Share %*	Guardian Name and Relationship (In case of Minor)*	Email Id/ Mobile No*	Address*
Nominee 1		D D M M Y Y Relationship		Guardian Name: Relationship:	Email: Mobile:	
Nominee 2		D D M M Y Y Relationship		Guardian Name: Relationship:	Email: Mobile:	
Nominee 3		D D M M Y Y Relationship		Guardian Name: Relationship:	Email: Mobile:	

* if % is not specified, then the assets shall be distributed equally amongst all the nominees (see table in 'Transmission aspects').
* 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.

1) 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).
2) This nomination shall supersede any prior nomination made by me / us, if any.
3) Signature(s) – As per the mode of holding in demat account(s) / MF folio(s)

Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder

Name of Witness	Address	Signature of Witness*
Witness 1		
Witness 2		

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

Acknowledgement Slip (To be filled in by the Investor) **Form for Fresh Nomination / Opt-out**

Application No

Collection Centre / Stamp & Signature

Received from Mr. / Ms. _____ Date : _____/_____/_____