#INVESTFORGOOD

NOMINATION FORM

For Individuals / NRIs / Sole Proprietors

DSP MUTUAL FUND

Update your nomination details digitally in less than 2 minutes!

Login to dspim.com

OR

Scan the QR code

1. On visiting the link or logging in, enter the 'Folios' section.
2. Select a folio and go to 'Nominee Details'
3. Click 'Edit Details' button.
4. Follow the process, & you'll be done in less than 2 minutes!

If you still prefer to send a physical request ☹, please use the form below.

Note: MF Distributors can also do this online for their clients using IFAXpress!

Folio No.	
Name of the Sole / First Holder	
Status (please ✓)	☐ Resident Individual ☐ NRI ☐ Sole Proprietor

I/We request DSP Mutual Fund (the fund) to update the Nomination in the folio as per details mentioned below.
I/We do hereby nominate the person/s more particularly described hereunder / and cancel the nomination made by me/us earlier in respect of Units held by Me/us.

NOMINATION (PREFERABLE) OR OPT OUT (AVOIDABLE) Nominee Details or Opt-Out Declaration (by way of tick) is mandatory to process the application.

Nomination OPT-IN (All details in below table is mandatory)

	Nominee Name/s & PAN	Relationship with applicant	If Nominee is a Minor*		Allocation (%)	Nominee/Guardian Signature
			Guardian Name & PAN	Date of Birth		
1						
2						
3						
Address					Total 100%	

*In case of each Minor as Nominee, please mention Guardian's relationship with Minor as Mother/Father/Legal Guardian & Attach proof like Birth Certificate/School Leaving Certificate/Passport/Others.

☐ **OPT-OUT declaration:** I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund 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 issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

Terms and Conditions

a. The unit holder/s may nominate upto three nominees, in whom the units held by unit holder/s shall vest in the event of death of all unitholder/s.
b. Nomination can be made only by individuals applying for / holding Units on their own behalf singly or jointly. Non-individuals (including societies, trusts, bodies corporate, partnership firms, etc.), Kartas of Hindu Undivided Families (HUF) and holders of Power of Attorney cannot nominate. Nomination facility is also not available for investments held on behalf of minor.
c. A minor can be nominated, and in that event, the name and address of the guardian minor nominee shall be provided by the Unit Holder. Nomination can also be in favour of the Central Government, State Government, a local authority; any person designated by virtue of his/her office, or a religious or charitable trust.
d. The nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of HUF, or a Power of Attorney holder. An NRI can be a nominee, subject to the exchange controls in force from time to time. Where the nomination is in favour of a religious or charitable trust, the investor should attach a certificate confirming that the nominee is a religious or charitable trust.
e. Nomination with the Fund can be made only by investors who opt for allotment in non demat form. In case of Units held in demat form, the nomination details as recorded for the depository account will be applicable investors who hold units in demat form may approach their DP for availing the nomination facility.
f. Nomination in respect of the units stands rescinded upon the transfer of units.
g. Transfer of Units in favour of a nominee(s) shall be valid discharge by the AMC against the legal heir.
h. On cancellation of the nomination, the nomination shall stand rescinded, and the AMC shall not be under any obligation to transfer the Units in favour of the nominee(s).
i. Nomination can be made in favour of more than one, and upto three individuals. Investors who desire to make nomination in respect of multiple nominees should clearly specify the percentages to be allocated between the nominees. If no percentages are mentioned, nomination will be done equally for all the nominees.
j. Nomination will be maintained at the folio or account level and will be applicable for all investments in the folio or account.
k. Where a folio has joint holders, all joint holders should sign the request for nomination, even if the mode of holding is not 'joint'.
l. A new nomination request will imply simultaneous cancellation of existing nomination and request for fresh nomination.
m. Applicants who do not wish to nominate, must at the designate space confirming their intention on not to nominate, failing which the form may be rejected at the discretion of the AMC/Fund.

Declarations & Signatures (To be signed by all joint holders, even in case of "Either or Survivor")

I / We have read the terms and conditions for nomination and hereby nominate the above nominee/s to receive all the amounts to my/our credits in the event of my/our death. Signature of the nominee/s acknowledging receipts of my/our credit will constitute full discharge of liabilities of DSP Mutual Fund.

Sole / First Holder | Second Holder | Third Holder

ACKNOWLEDGEMENT SLIP - NOMINATION FORM **DSP MUTUAL FUND**

Received, subject to verfication, request for updation of the Nomination in :

Folio No. :

Website: www.dspim.com **email:** service@dspim.com **Contact Centre**: 1800-200-4499 / 1-800-208-4499

ISC Stamp & Signature