

Form for Fresh Nomination

Date:

Folio Number(s)

1. I/We wish to make nomination {as per details given below}
You can nominate upto 3 persons

	Details	1 st Nominee	2 nd Nominee	3 rd Nominee
1	Name of the nominee*			
2	Relationship with the applicant			
3	Date of Birth (to be provided in case the nominee is a minor)			

2. I want the following nomination details to be printed in the Account Statements (tick one of the boxes below)

☐ Name of the Nominee(s) ☐ Whether Nomination given: Yes/No (not name of the nominee)

3. Optional Details of nomination

	Details	1 st Nominee	2 nd Nominee	3 rd Nominee
a)	% Share of nominee** (equal share if % is not specified)			
b)	Mobile of nominee*** (Please note that the MF/RTA will be able to reach out to your nominee if you provide the contact details)			
c)	Email ID of nominee*** (Please note that the MF/RTA will be able to reach out to your nominee if you provide the contact details)			
d)	Specify Personal identifier document • Aadhaar (last four digit), PAN, Driving Licence, Passport ***			
e)	Guardian Name (applicable if the Nominee is minor)			

**Any odd lot after division shall be transferred to the first nominee mentioned in the form.
*** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.

4. Signature

Name(s) of holder(s)	Signature(s) of holder****
Sole / First Holder (Mr./Ms.)	
Second Holder (Mr./Ms.)	
Third Holder (Mr./Ms.)	

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.

- Note:**
- Investors can provide, changes or cancel nominations any number of times.
 - The signature of all the joint holders shall be obtained for providing / changing nomination regardless of mode of operations.
 - This nomination shall supersede any prior nomination made by the investor(s), if any.
 - Investors can change nomination any number of times.
 - Investor have the right to receive acknowledgement of the nomination form for each instance of nomination / subsequent change.

Additional points to be noted

Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder cannot nominate.

Nomination is not allowed in a folio where Minor is the unitholder.

A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee is to be provided optionally.

Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.

The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family, or a Power of Attorney holder.

A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.

Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio.

Nomination shall stand rescinded upon the transfer of units.

Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).

The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.

In respect of folios where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.

Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single folio.

Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC.

