

Nomination Details

☐ 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 nonappointment 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

OR ☐ 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)

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/ folio in the event of my/our demise, as trustee and on behalf of my/our legal heir(s). This nomination shall supersede any prior nomination made by me/us if any.

Nomination Details

Mandatory Details

Additional Details

	Name of Nominee	Share of Nominee (%)	Relationship*	Postal Address	Mobile number & E-mail	Identity Number ***	DOB of nominee	Guardian
Nominee 1								
Nominee 2								
Nominee 3								

You may nominate a maximum of 10 persons, to receive the Units/amounts standing to your credit payable in the event of death of the Unit Holder(s) in respect of investment under a folio. In case of more than 3 nominees, please fill a separate nomination form.

* Spouse, Husband, Father, Mother, Son, Daughter or Others(Please specify)

*** Provide only number: PAN or Driving Licence or Aadhaar (last 4). Copy of the document is not required.

**** to be furnished only in following conditions / circumstances:

- Date of Birth (DOB): please provide, only if the nominee is minor.
- Guardian: It is optional for you to provide, if the nominee is minor.

I/We want the details of my/our nominee to be printed in the statement of holding or statement of account, provided to me/us by the AMC/DP as follows: (please as appropriate)

☐ Name of nominee(s) with % ☐ Nomination: Yes / No (Default)

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

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

- The nomination may be made only by individuals applying for/holding units on their own behalf, singly or jointly.
- Non-individuals including society, trust, body corporate, partnership firm, Karta of HUF, holder of POA or a parent/guardian applying on behalf of a minor beneficiary cannot nominate.
- A minor can be nominated and in that event, the name and address of the guardian of the minor nominee shall be provided in the application. Nomination can also be in favour of the Central Government, State Government, and 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 can be a Nominee subject a to the exchange control regulations in force, from time to time.
- Transfer of units in favour of a Nominee shall be valid discharge by the AMC/Mutual Fund against the legal heir.
- The cancellation of nomination can be made only by the individual(s) who hold units on their own behalf singly or jointly and who made the original nomination. 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.
- In case of demise of the investor and any one of the nominees, Unifi AMC will distribute the assets pro-rata to other nominees.
- It is recommended for the nominee/Guardian (in case the nominee is a minor) to provide the signature in the space provided.
- Investors should opt for the nomination facility to avoid hassles and inconveniences in case of unforeseen events in future. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
- Nomination by a Unit holder shall be applicable for all the investments in all schemes held in a particular folio.
- Nomination shall not be allowed in a folio held on behalf of a minor Unit holder.
- Nomination shall be mandatory for all new singly held folios of individual investors.
- In case of multiple nominees, the percentage of allocation/share in whole numbers and without decimals in favour of each of the nominees should be indicated against the name of the nominees. Such allocation/ share should total to 100 percent. In the event of the Unit holder(s) fail to indicate the percentage of allocation/share for each of the nominees, the Fund/ AMC, by invoking default option shall settle the claim equally amongst all the nominees. In case you do not wish to nominate, kindly indicate by ticking in the space provided.