

## Nomination Form (Registration / Addition / Cancellation)

This form can be used to assign a nominee to your investment or cancel the nomination previously made by you.

I / We \_\_\_\_\_  
 and \_\_\_\_\_ \*do hereby nominate the person more  
 particularly described hereunder / and / cancel the nomination, made by me / us or \_\_\_\_\_  
 in respect of the units in the folio no(s) \_\_\_\_\_ (\*Strike out which is not applicable)

Name of the Nominee: \_\_\_\_\_ Percentage: \_\_\_\_\_ (Should not be in decimal)  
 Name of the Guardian: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Date of Birth\*: \_\_\_\_\_  
 Address of Nominee/ Guardian: \_\_\_\_\_  
 City: \_\_\_\_\_ Pin: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Signature of Nominee/ Guardian: \_\_\_\_\_  
 (\*Mandatory in case of Minor Nominee)

Name of the Nominee: \_\_\_\_\_ Percentage: \_\_\_\_\_ (Should not be in decimal)  
 Name of the Guardian: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Date of Birth\*: \_\_\_\_\_  
 Address of Nominee/ Guardian: \_\_\_\_\_  
 City: \_\_\_\_\_ Pin: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Signature of Nominee/ Guardian: \_\_\_\_\_  
 (\*Mandatory in case of Minor Nominee)

Name of the Nominee: \_\_\_\_\_ Percentage: \_\_\_\_\_ (Should not be in decimal)  
 Name of the Guardian: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Date of Birth\*: \_\_\_\_\_  
 Address of Nominee/ Guardian: \_\_\_\_\_  
 City: \_\_\_\_\_ Pin: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Signature of Nominee/ Guardian: \_\_\_\_\_  
 (\*Mandatory in case of Minor Nominee)

**Signature/s**

\_\_\_\_\_

**1st Unitholder/  
 Authorised Signatory**

\_\_\_\_\_

**2nd Unitholder/  
 Authorised Signatory**

\_\_\_\_\_

**3rd Unitholder/  
 Authorised Signatory**

In case of multiple holders in the folio, all holders must sign the request for registration / addition / cancellation of nomination irrespective of mode of holding.

Date: \_\_\_\_\_

Place: \_\_\_\_\_

## **INSTRUCTIONS**

1. The nomination can 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 Hindu Undivided family, holder of Power of Attorney cannot nominate. All unit holders should sign the Nomination Form irrespective of mode of holding.
2. Minor(s) can be nominated and in that event, the name, address and signature of the guardian of the minor nominee(s) 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 office or a religious or charitable trust.
3. The Nominee shall not be a 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 to the exchange control regulation in force, from time to time.
4. Nomination in respect of the units stands rescinded upon the transfer of units.
5. Nomination can be made for maximum number of three nominees. In case of multiple nominees, the percentage of allocation/share in favour of each of the nominees should be indicated against their name and such allocation/share should be in whole numbers without any decimals making a total of 100 percent.
  - If the aggregate is less than 100% then the balance will be re-balanced to the first unit holder. If the aggregate is greater than 100% then nomination would be rejected.
  - In the event of the Unit holders not indicating the percentage of allocation/share for each of the nominees, Mutual Fund / Asset Management Company, by invoking default option shall settle the claim equally amongst all the nominees.
6. Transfer of units in favour of Nominee(s) shall be valid discharge by the Asset Management Company against the legal heir.
7. The cancellation of nomination can be made only by those individuals who hold units on their behalf singly or jointly and who made the original nomination.
8. On cancellation of the nomination, the nomination shall stand rescinded and the Asset Management Company shall not be under any obligation to transfer the units in favour of the Nominee(s).