

Form for Fresh Nomination / Change of Existing Nomination

Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders Please read the instructions carefully before filling up this form

Name of 1st Holder _____

Name of 2nd Holder _____

Name of 3rd Holder _____

I/We, the above-named investors of _____ Mutual Fund, do hereby nominate the person(s) more particularly described hereunder to receive the Units held my/our Folio/s listed below in the event of my / our death by cancelling the nomination(s) made by me / us previously in respect of the units held by me/ us in the Folio/s listed below.

Folio No. / Application No.
1.
2.
3.

Name of the 1st Nominee*	% of Allocation*
PAN of the Nominee\$	Date of Birth of Nominee** DD / M / YYYY
Nominee Relationship*	
Name of the Guardian **	PAN of Nominee Guardian\$
Guardian's Relationship with Nominee** <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	
Proof of relationship\$ <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others	
Address\$	
City	State PIN

Name of the 2nd Nominee*	% of Allocation*
PAN of the Nominee\$	Date of Birth of Nominee** DD / M / YYYY
Nominee Relationship*	
Name of the Guardian **	PAN of Nominee Guardian\$
Guardian's Relationship with Nominee** <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	
Proof of relationship\$ <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others	
Address\$	
City	State PIN

Name of the 3rd Nominee*	% of Allocation*
PAN of the Nominee\$	Date of Birth of Nominee** DD / M / YYYY
Nominee Relationship*	
Name of the Guardian **	PAN of Nominee Guardian\$
Guardian's Relationship with Nominee** <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	
Proof of relationship\$ <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others	
Address\$	
City	State PIN

☐ I/We DO NOT wish to make a nomination. (Please sign in "Nomination Opt Out Declaration" below)

Nomination Opt Out Declaration: I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my/ our mutual fund units held in my / our 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.

Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder
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*ALL Applicants must sign.

I/We have read and understood the instructions on nomination given below/overleaf and I/We hereby undertake to abide by the same. The instructions contained herein supercedes all previous nominations made by me/us in respect of the folio(s) mentioned above.

Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder
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*Mandatory \$ Optional **Mandatory & Applicable in case the Nominee is a Minor