

# Nomination Form

For Registration / Modification / Cancellation of Nominees / Opt out of Nomination  
(for Individual Unit Holders only)



Folio No.

Date

Name of 1<sup>st</sup> Holder :

Name of 2<sup>nd</sup> Holder :

Name of 3<sup>rd</sup> Holder :

I / We wish to :

- ☐ Register<sup>1</sup> a Nominee for our investments ☐ Modify<sup>1</sup> nomination registered in the folio ☐ Cancel nomination registered in the folio
- ☐ Declare that I / We do not wish to appoint a nominee for our investments in the above folio. I / We understand that in the event of death of all unitholder(s) in the folio, the legal heirs for the unit holders would need to submit all requisite documents for transmitting the units in favour of the legal heir based on applicable legal / regulatory requirements at the stage of initiation of the transmission request.

## NEW NOMINATION TO BE PROVIDED FOR REGISTRATION / MODIFICATION

Name of 1 <sup>st</sup> Nominee : <input type="text"/>	
PAN** <input type="text"/>	Date of Birth* <input type="text"/>
Relationship with 1 <sup>st</sup> holder : <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Spouse <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Proof of relationship : <input type="checkbox"/> Birth Certificate <input type="checkbox"/> Marriage Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Address of Nominee (Please ✓) <input type="checkbox"/> Same Address as is updated in the folio <input type="checkbox"/> Different Address. Please provide details below:	
Address: <input type="text"/>	
City : <input type="text"/>	State : <input type="text"/> PIN <input type="text"/>
% of Allocation <sup>2</sup> : <input type="checkbox"/> 100% <input type="checkbox"/> 75% <input type="checkbox"/> 50% <input type="checkbox"/> 33⅓% <input type="checkbox"/> 25% <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Guardian Information (To be <b>mandatorily</b> provided if Nominee is below 18 years of age)	
Name of Guardian : <input type="text"/>	PAN of Guardian* <input type="text"/>
Guardian's Relationship with Nominee* : <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	

Name of 2 <sup>nd</sup> Nominee : <input type="text"/>	
PAN** <input type="text"/>	Date of Birth* <input type="text"/>
Relationship with 1 <sup>st</sup> holder : <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Spouse <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Proof of relationship : <input type="checkbox"/> Birth Certificate <input type="checkbox"/> Marriage Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Address of Nominee (Please ✓) <input type="checkbox"/> Same Address as is updated in the folio <input type="checkbox"/> Different Address. Please provide details below:	
Address: <input type="text"/>	
City : <input type="text"/>	State : <input type="text"/> PIN <input type="text"/>
% of Allocation <sup>2</sup> : <input type="checkbox"/> 100% <input type="checkbox"/> 75% <input type="checkbox"/> 50% <input type="checkbox"/> 33⅓% <input type="checkbox"/> 25% <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Guardian Information (To be <b>mandatorily</b> provided if Nominee is below 18 years of age)	
Name of Guardian : <input type="text"/>	PAN of Guardian* <input type="text"/>
Guardian's Relationship with Nominee* : <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	

Name of 3 <sup>rd</sup> Nominee : <input type="text"/>	
PAN** <input type="text"/>	Date of Birth* <input type="text"/>
Relationship with 1 <sup>st</sup> holder : <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Spouse <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Proof of relationship : <input type="checkbox"/> Birth Certificate <input type="checkbox"/> Marriage Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Address of Nominee (Please ✓) <input type="checkbox"/> Same Address as is updated in the folio <input type="checkbox"/> Different Address. Please provide details below:	
Address: <input type="text"/>	
City : <input type="text"/>	State : <input type="text"/> PIN <input type="text"/>
% of Allocation <sup>2</sup> : <input type="checkbox"/> 100% <input type="checkbox"/> 75% <input type="checkbox"/> 50% <input type="checkbox"/> 33⅓% <input type="checkbox"/> 25% <input type="checkbox"/> Others <input type="text"/> (Please specify)	
Guardian Information (To be <b>mandatorily</b> provided if Nominee is below 18 years of age)	
Name of Guardian : <input type="text"/>	PAN of Guardian* <input type="text"/>
Guardian's Relationship with Nominee* : <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	

\* Mandatory if nominee is below 18 years of age (minor). Please also attach a copy of the birth certificate / alternate proof of date of birth of the nominee.

\*\* PAN of nominee must be mandatorily furnished if nominee is above 18 years of age.

<sup>1</sup> Nomination details provided would over-ride any previous nomination registered in the folio.

<sup>2</sup> Please ensure that sum of allocation% across all nominees in the folio adds up to exactly 100%.

Signature of 1 <sup>st</sup> holder	Signature of 2 <sup>nd</sup> holder	Signature of 3 <sup>rd</sup> holder
-------------------------------------	-------------------------------------	-------------------------------------

(To be signed by all unit holders in the folio)