

Format for providing Nomination

Applicable for Individual Unitholders only (effective from June 01, 2025 to August 31, 2025)
Please read the instructions carefully before filling up this form

Folio No.(s) having same mode of holding and pattern			
Investor Name			
I/We wish to make a nomination. [As per details given below]			
Nomination Details			
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 in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any.			
Nomination can be made upto three nominees in the account.	Details of 1 st Nominee	Details of 2 nd Nominee	Details of 3 rd Nominee
Mandatory information			
1	Name of the nominee(s) Mr./Ms.	Mr./Ms.	Mr./Ms.
2	Share of each Nominee# %	%	%
3	Date of Birth (in case Nominee is Minor) dd-mmm-yyyy	dd-mmm-yyyy	dd-mmm-yyyy
4	Relationship with the Applicant (select one) ☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify) _____	☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify) _____	☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify) _____
5	Nominee/ Guardian (in case of Minor) Identification details [Please tick any one of the following and provide ID Number and no copies required]. ☐ PAN _____ ☐ Aadhaar(last 4 digits) **** * ☐ Passport(for NRIs/OCIs/PIOs) _____ ☐ Driving License _____	☐ PAN _____ ☐ Aadhaar(last 4 digits) **** * ☐ Passport (for NRIs/OCIs/PIOs) _____ ☐ Driving License _____	☐ PAN _____ ☐ Aadhaar(last 4 digits) **** * ☐ Passport(for NRIs/OCIs/PIOs) _____ ☐ Driving License _____
6	Address of Nominee(s)/ Guardian in case of Minor City / Place: State & Country Pincode:	Pincode:	Pincode:
7	Mobile of nominee(s)/ Guardian in case of Minor		
8	Email ID of nominee(s)/ Guardian in case of Minor		
Non-Mandatory details			
9	Nominee Guardian Name (in case Nominee is Minor)		
I / We want the details of my / our nominee to be printed in the statement of holding, provided to me/ us by the AMC as follows; (please tick, as appropriate)			
☐ Name of nominee(s) with % ☐ Nomination: Yes / No (Default)			

Nomination Form - Acknowledgement Slip

Folios :			
Name of 1 st Unit holder			ACKNOWLEDGEMENT STAMP
Name of 2 nd Unit holder			
Name of 3 rd Unit holder			

This nomination shall supersede any prior nomination made by the account holder(s), if any		
Signature(s) – As per mode of holding in MF Folio(s).		
	Name of the Holder	Signature / Thumb Impression
Sole / First Holder (Mr./Ms.)	Name:	Signature /Thumb Impression:
	Witness 1 Name & Address:	Witness 1 Signature:
	Witness 2 Name & Address:	Witness 2 Signature:
Second Holder (Mr./Ms.):	Name:	Signature /Thumb Impression:
	Witness 1 Name & Address:	Witness 1 Signature:
	Witness 2 Name & Address:	Witness 2 Signature:
Third Holder (Mr./Ms.):	Name:	Signature /Thumb Impression:
	Witness 1 Name & Address:	Witness 1 Signature:
	Witness 2 Name & Address:	Witness 2 Signature:
<i>* Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature.</i> <i># Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form.</i>		
Note: The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)		