

Annexure - A

Format for Providing Nomination				
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) who shall receive all the assets held in my/our account in the event of my/our death.				
Nomination can be made up to three nominees in the account		Details of 1 st Nominee	Details of 2 nd Nominee	Details of 3 rd Nominee
Mandatory Details				
1	Name of the nominee(s) (Mr./Ms.)*			
2	Share of each Nominee	Equally (If not equally, please specify percentage)	%	%
		Any odd lot after division shall be transferred to the first nominee mentioned in the form.		
3	Relationship With the Applicant (if Any)			
*Date of Birth and Name of Guardian to be provided in case of minor nominee(s)				
Non-mandatory Details				
4	Address of Nominee(s)/ Guardian in case of Minor City/Place: State & Country: PIN Code			
5	Mobile/Telephone No. of nominee(s)/ Guardian in case of Minor			
6	E-mail ID of nominee(s)/ Guardian in case of Minor			
7	Nominee/Guardian (in case of Minor) Identification details – (Please tick any one of following and provide details of same) <input type="checkbox"/> Photograph & Signature <input type="checkbox"/> PAN <input type="checkbox"/> Aadhaar <input type="checkbox"/> Savings Bank account No. <input type="checkbox"/> Proof of Identity <input type="checkbox"/> Demat Account ID			

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

*Signature of witness, along with name and address are required, if the accountholder affixes thumb impression, instead of signature.

Note:

This nomination shall supersede any prior nomination made by the accountholder(s), if any.

The Intermediary shall provide acknowledgement of the nomination form to the accountholder(s).

Annexure - B

Declaration for opting-out of nomination

I/We hereby confirm that I/we do not wish to appoint any nominee(s) in my/our MF Folio/demat account 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/information for claiming of assets held in my/our MF Folio/demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio/demat account.

Name and Signature of Holder(s)*

1. _____ 2. _____ 3. _____

*Signature of witness, along with name and address are required, if the accountholder affixes thumb impression, instead of signature.