Nomination form for Mutual Fund (MF) Folios

Folio No./ PAN/ Application No.	
1.	4.
2.	5.
3.	6.

I/We, holding above Folio No./ PAN/ Application No. of _____ Mutual Fund, hereby nominate the following person(s) who shall receive all the assets held in my / our account / folio in the event of my / our demise, as trustee and on behalf of my / our legal heir(s) *** (1)**

Note: As per SEBI circular dated January 10, 2025 on Revise and Revamp Nomination Facilities in the Indian Securities Market, Investors can nominate up to 10 persons in the account / folio with effect from September 01, 2025.

Mandatory Details of Nominee							
Sr. No	**Name**	**% Share****	**Relationship**	**Postal Address**	**Mobile Number & Email id**	**Identity Document** (PAN or Driving License or Aadhaar)	**Identity Number** (PAN or Driving License or Aadhaar last 4 digit) Copy of the Document is not required.
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

** if % is not specified, then the assets shall be distributed equally amongst all the nominees (see table in 'Transmission aspects').

Additional Details, only if the nominee is minor		
Nominee Number	**D.o.B. of nominee**	**Guardian**
Nominee 1		
Nominee 2		
Nominee 3		
Nominee 4		
Nominee 5		
Nominee 6		
Nominee 7		
Nominee 8		
Nominee 9		
Nominee 10		

1) 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) ☐ Nomination: Yes / No

2) I hereby authorize (nominee number __) to operate my account on my behalf, in case of my incapacitation in terms of paragraph 3.5 of the circular. He / She is authorized to encash my assets up to ___% of assets in the account / folio or Rs. _____.
   (strike off portions that are not relevant)

3) This nomination shall supersede any prior nomination made by me / us, if any.

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

* Signature of two witness(es), along with name and address are required, if the account holder affixes thumb impression, instead of wet signature.

Rights, Entitlement and Obligation of the investor and nominee:

***(1)** Joint Accounts:

Event	Transmission of Account / Folio to
Demise of one or more joint holder(s)	Surviving holder(s) through name deletion The surviving holder(s) shall inherit the assets as owners.
Demise of all joint holders simultaneously – having nominee	Nominee
Demise of all joint holders simultaneously – not having nominee	Legal heir(s) of the youngest holder

- If your are opening a new demat account / MF folios, you have to provide nomination. Otherwise, you have to follow procedure as per 3.10 of this circular.
- You can make nomination or change nominee any number of times without any restriction.
- You are entitled to receive acknowledgement from the AMC / DP for each instance of providing or changing nomination.
- Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single account / folio.
- In case all your nominees do not claim the assets from the AMC / DP, then the residual unclaimed asset shall continue to be with the AMC in case of MF units and with the concerned Depository in case of Demat account.
- You have the option to designate any one of your nominees to operate your account / folio, if case of your physical incapacitation. This mandate can be changed any time you choose.
- The signatories for this nomination form in joint folios / account, shall be the same as that of your joint MF folio / demat account. i.e.
  - 'Either or Survivor' Folios / Accounts - any one of the holders can sign
  - 'Jointly' Folios / Accounts - both holders have to sign