

NOMINATION FORM

Date:

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Client Code : _____

Client Name : _____

NOMINATION DETAILS (Please tick appropriately) (Individuals are advised to avail of Nomination Facility, whether investing singly or jointly.)

I/We do hereby nominate the person's more particularly described hereunder / and cancel the nomination made by me/us earlier, if any, in respect of account (folio) held by me/us as provided herein.
I/We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the Portfolio Manager.

Nominee Photo

Please affix nominee's photograph. The nominee is required to sign across the photograph.

Nominee Photo

Please affix nominee's photograph. The nominee is required to sign across the photograph.

Nominee Photo

Please affix nominee's photograph. The nominee is required to sign across the photograph.

Guardian Photo

Please affix Guardian's photograph. The Guardian is required to sign across the photograph.

(In case nominee is minor)

Name & Address of the Nominee(s)	Nominee's Relation with the applicant	Date of Birth (in case nominee is minor)	Percentage %* of allocation (*should not be in decimals)	Name & Address of Guardian (in case nominee is minor)	Signature of Nominee/Guardian (Guardian Sign in case nominee is minor)
1.					
2.					
3.					

TERMS & CONDITIONS

- i) Applicant(s) can nominate maximum upto 3 person(s) in whom all rights including beneficial ownership and/or money payable in respect of portfolio shall vest in the event of death. It shall be mandatory to indicate clearly the percentage of allocation / share in favour of each of the nominees against their name and such allocation / share should be in whole numbers without any decimal making a total of 100 percent. In the event of the applicant not indicating the percentage of allocation / share for each of the nominees, the Portfolio Manager by invoking default option shall settle the claim equally amongst all the nominees.
- ii) A new nomination request will imply simultaneous cancellation of existing nomination and request for fresh nomination.
- iii) The nomination can be made only by individuals applying for / holding units on their own behalf singly or jointly in favour of one more persons. Non-individuals including society, trust, body corporate, partnership firm, karta of Hindu Undivided Family, Holder of Power of attorney cannot nominate. Nomination form cannot be signed by Power of attorney (PoA) holders.
- iv) All the applicants must sign the nomination form.
- v) A minor can be nominated and in that event, the name and address of the guardian of the nominee shall be provided by the applicant. The applicant is advised that, in case of Single Holding, the Guardian to a Minor Nominee should be a person other than the Applicant.
- vi) The Nominee can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of these offices or a religious or charitable trust.
- vii) The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta Hindu Undivided Family or a Power of Attorney holder. A non-resident indian can be a Nominee subject to the exchange controls in force, from time to time
- viii) Nomination in respect of the portfolio stands rescinded upon closure of the Portfolio Management Services account. Similarly the nomination in respect of the securities shall stand terminated upon transfer of the securities.
- ix) Transfer of portfolio in favour of a Nominee shall be valid discharge by the Portfolio Manager against legal heirs.
- x) In case of dispute between applicant's nominee and any of his / her legal heirs and / or successors, the Portfolio Manager shall be fully discharged of its liabilities and obligations if it pays the amount and / or securities that stand to the credit of his / her designated Nominee.
- xi) This Nomination will stand cancelled in the event of applicant's nominee pre-deceasing the client.
- xii) If the nomination details are not completed in all respects, the Portfolio Manager reserves the right not to register the nomination

I / We confirm that details provided by me/us are true and correct.

	First Applicant	Second Applicant	Third Applicant
Signature/ASL Stamp			
Applicant Name			

	Witness 1	Witness 2
Signature		
Name		

Place: _____

Date: _____