

## Nomination Form

**BO-ID** 
**UCC** 

### Nomination Details

I / We 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<sup>st</sup> Nominee Details

##### Mandatory Details:

Name of Nominee Postal	<input type="text"/>		
Address	<input type="text"/>		
Relationship with the Applicant	<input type="text"/>	Share of Nominee (%)**	<input type="text"/> %
Mobile No.	<input type="text"/>	Identity Number ***	<input type="text"/>
E-mail ID	<input type="text"/>		

##### Additional Details\*\*\*\*

Guardian  Date of Birth Nominee

(If the nominee is minor)

#### 2<sup>nd</sup> Nominee Details

##### Mandatory Details:

Name of Nominee Postal	<input type="text"/>		
Address	<input type="text"/>		
Relationship with the Applicant	<input type="text"/>	Share of Nominee (%)**	<input type="text"/> %
Mobile No.	<input type="text"/>	Identity Number ***	<input type="text"/>
E-mail ID	<input type="text"/>		

##### Additional Details\*\*\*\*

Guardian  Date of Birth Nominee

(If the nominee is minor)

#### 3<sup>rd</sup> Nominee Details

##### Mandatory Details:

Name of Nominee Postal	<input type="text"/>		
Address	<input type="text"/>		
Relationship with the Applicant	<input type="text"/>	Share of Nominee (%)**	<input type="text"/> %
Mobile No.	<input type="text"/>	Identity Number ***	<input type="text"/>
E-mail ID	<input type="text"/>		

##### Additional Details\*\*\*\*

Guardian  Date of Birth Nominee

(If the nominee is minor)



### 8<sup>th</sup> Nominee Details

#### Mandatory Details:

Name of Nominee Postal			
Address			
Relationship with the Applicant		Share of Nominee (%)**	%
Mobile No.		Identity Number ***	
E-mail ID			

#### Additional Details\*\*\*\*

Guardian <small>(If the nominee is minor)</small>		Date of Birth Nominee	<div>D</div> <div>D</div> <div>M</div> <div>M</div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div>
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### 9<sup>th</sup> Nominee Details

#### Mandatory Details:

Name of Nominee Postal			
Address			
Relationship with the Applicant		Share of Nominee (%)**	%
Mobile No.		Identity Number ***	
E-mail ID			

#### Additional Details\*\*\*\*

Guardian <small>(If the nominee is minor)</small>		Date of Birth Nominee	<div>D</div> <div>D</div> <div>M</div> <div>M</div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div>
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### 10<sup>th</sup> Nominee Details

#### Mandatory Details:

Name of Nominee Postal			
Address			
Relationship with the Applicant		Share of Nominee (%)**	%
Mobile No.		Identity Number ***	
E-mail ID			

#### Additional Details\*\*\*\*

Guardian <small>(If the nominee is minor)</small>		Date of Birth Nominee	<div>D</div> <div>D</div> <div>M</div> <div>M</div> <div>Y</div> <div>Y</div> <div>Y</div> <div>Y</div>
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\*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 % is not specified, then the assets shall be distributed equally amongst all the nominees (see table in 'Transmission aspects').

\*\*\* Provide only number: PAN or Driving Licence or Aadhaar (last 4). Copy of the document is not required.

\*\*\*\* to be furnished only in following conditions / circumstances:

- Date of Birth (DOB): please provide, only if the nominee is minor.
- Guardian: It is optional for you to provide, if the nominee is minor.

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

	Name(s) of holder	Signature(s) of holder	Witness Signature*
<b>Sole / First Holder</b> (Mr. / Ms. / Mrs.)			
<b>Second Holder</b> (Mr. / Ms. / Mrs.)			
<b>Third Holder</b> (Mr. / Ms. / Mrs.)			

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

### Transmission Aspects

- AMCs / DPs shall transmit the folio / account to the nominee(s) upon receipt of 1) copy of death certificate and 2) completion / updation of KYC of the nominee(s). The nominee is not required to provide affidavits, indemnities, undertakings, attestations or notarization.
- Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC / DP.
- In case of multiple nominees, the assets shall be distributed pro-rata to the surviving nominees, as illustrated below.

% share as specified by investor at the time of nomination		% assets to be apportioned to surviving nominees upon demise of investor and nominee 'A'			
Nominee	% share	Nominee	% initial Share	% of A's share to be apportioned	Total % share
A	60%	A	0	0	0
B	30%	B	30%	45%	75%
C	10%	C	10%	15%	25%
<b>Total</b>	<b>100%</b>	<b>-</b>	<b>40%</b>	<b>60%</b>	<b>100%</b>

For PL-HO Office use only:

Demat A/c Nomination  Registration Date 

D	D
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M	M
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Y	Y	Y	Y
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Registration No.