

## Annexure-A

### Format for providing Nomination

I/We wish to make a nomination. [As per details given below]				
<b>Nomination Details</b>				
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.				
<b>Nomination can be made upto three nominees in the account.</b>		<b>Details of 1<sup>st</sup> Nominee</b>	<b>Details of 2<sup>nd</sup> Nominee</b>	<b>Details of 3<sup>rd</sup> Nominee</b>
<b>Mandatory Details</b>				
1	<b>Name of the nominee(s) (Mr./Ms.)*</b>			
2	<b>Share of each Nominee</b>	Equally	%	%
		[If not equally, please specify percentage]	<i>Any odd lot after division shall be transferred to the first nominee mentioned in the form.</i>	
3	<b>Relationship With the Applicant ( If Any)</b>			
* Date of Birth and Name of Guardian to be provided in case of minor nominee(s)				
<b>Non-mandatory Details</b>				
4	<b>Address of Nominee(s)/ Guardian in case of Minor</b>			
	City / Place: State & Country:			
	PIN Code			
5	<b>Mobile / Telephone No. of nominee(s)/ Guardian in case of Minor</b>			
6	<b>Email ID of nominee(s)/ Guardian in case of Minor</b>			

7	<b>Nominee/ Guardian (in case of Minor) Identification details – [Please tick any one of following and provide details of same]</b>  <input type="checkbox"/> Photograph & Signature <input type="checkbox"/> PAN <input type="checkbox"/> Aadhaar <input type="checkbox"/> Saving Bank <input type="checkbox"/> account no. <input type="checkbox"/> Proof of <input type="checkbox"/> Identity <input type="checkbox"/> Demat Account ID			
<b>Name(s) of holder(s)</b>				<b>Signature(s) of holder*</b>
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 account holder affixes thumb impression, instead of signature.

**Note:**

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

The Intermediary shall provide acknowledgement of the nomination form to the account holder(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 account holder affixes thumb impression, instead of signature.