Format for providing Nomination for Demat Account and MF Folios

Mandatory for MF Folios with Single Holding only (effective from September 01, 2026)
Please read the instructions carefully before filling up this form

Name of the Mutual Fund	
Folio No(s)	
Investor Name	

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) in the above specified folio(s) who shall receive all the assets held in my / our folio / account in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any.

1. Mandatory Details

S. No.	Details	1st Nominee	2nd Nominee	3rd Nominee
1	Name of the nominee			
2	Relationship with the Applicant			
3	*Date of Birth (to be provided in case of nominee is minor)*			

2. I want the following nomination details to be printed in the account / holding statements (tick one of the boxes below):

☐ Name of the Nominee(s)

☐ Whether nomination given: Yes / No (not name of the nominee)

3. A. Optional details of nomination:

S. No.	Information	1st Nominee	2nd Nominee	3rd Nominee
a)	% Share of nominee** (equal share if % is not specified)			
b)	Mobile of nominee*** *(Please note that the DP / MFRTA will be able to reach out to your nominee if you provide the contact details).*			
d)	Email ID of nominee*** *(Please note that the DP / MFRTA will be able to reach out to your nominee if you provide the contact details).*			
e)	Specify Personal identifier document • Aadhaar (last four digit), PAN, Driving Licence, Passport *** *No documentary proof is mandated*			
f)	Guardian Name (applicable if the Nominee is minor)			

***Any odd lot after division shall be transferred to the first nominee mentioned in the form.*
**** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.*

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

Signature:

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

****If nomination is submitted:

- ***Online:*** *validate through Digital Signature Certificate or Aadhaar-based e-sign or by using any other e-sign facility recognized under Information Technology Act, 2000 or two factor authentication (2FA) in which one of the factors shall be a One-Time Password sent to the registered mobile number and email address.*
- ***Physical / offline:*** *wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses shall be duly provided in this form.*

Name(s) of holder(s)	Thumb Impression	Witness Name & Address	Witness Signature
Sole / First Holder (Mr./Ms.)			
Second Holder (Mr./Ms.)			
Third Holder (Mr./Ms.)			

Note:

- Investors can provide changes or cancel nominations any number of times.
- The signature of all the joint holders shall be obtained for providing / changing nomination.
- This nomination shall supersede any prior nomination made by the investor(s), if any.
- Investors can change nomination any number of times.
- Investors have the right to receive acknowledgement of the nomination form for each instance of nomination / subsequent change.

Additional points to be noted.

- Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder cannot nominate.
- Nomination is not allowed in a folio where Minor is the unitholder.
- A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee is to be provided optionally.
- Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.
- The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family, or a Power of Attorney holder.
- A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
- Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
- Nomination shall stand rescinded upon the transfer of units.
- Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).
- The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
- In respect of folios/accounts where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.
- 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.
- 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.

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