

NOMINATION DETAILS

Nomination Registration No. :

Dated :

☐ I/We hereby confirm that I/We **do not wish to appoint any nominee in my demat account** and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my / our demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the demat account...

	First/ Sole Holder or Guardian (in case of Minor)	Second Holder	Third Holder
Name			
Signatures			

Signature OF witness along with name and address are required, if the account holder affixes thumb impression, instead of signature

☐ I/We **wish to make a nomination and do here bt nominate** the following person(s) who shall receive all assests held in my / our account in the event of my / our death.

Nominee 1

Mandatory Details	
1. Name of Nominee 1	
2. Share of Nominee 1 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 1	
9. Guardian	

Nominee 2

Mandatory Details	
1. Name of Nominee 2	
2. Share of Nominee 2 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 2	
9. Guardian	

Nominee 3

Mandatory Details	
1. Name of Nominee 3	
2. Share of Nominee 3 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 3	
9. Guardian	

Nominee 4	
Mandatory Details	
1. Name of Nominee 4	
2. Share of Nominee 4 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 4	
9. Guardian	

Nominee 5	
Mandatory Details	
1. Name of Nominee 5	
2. Share of Nominee 5 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 5	
9. Guardian	

Nominee 6	
Mandatory Details	
1. Name of Nominee 6	
2. Share of Nominee 6 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 6	
9. Guardian	

Nominee 7	
Mandatory Details	
1. Name of Nominee 7	
2. Share of Nominee 7 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 7	
9. Guardian	

Nominee 8	
Mandatory Details	
1. Name of Nominee 8	
2. Share of Nominee 8 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 8	
9. Guardian	

Nominee 9	
Mandatory Details	
1. Name of Nominee 9	
2. Share of Nominee 9 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 9	
9. Guardian	

Nominee 10	
Mandatory Details	
1. Name of Nominee 10	
2. Share of Nominee 10 (%)**	
3. Relationship	
4. Postal Address	
5. Mobile Number	
6. Email ID	
7. Identity Number***	
Additional Details****	
8. Date of Birth of Nominee 10	
9. Guardian	

* 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. Any odd lot after division/ fraction of %, shall be transferred to the first nominee mentioned in the nomination form. (see table in 'Transmission aspects').

*** Provide only number: PAN or Driving Licence or Aadhaar (last 4). Copy of the document is not required. However, in case of NRI/ OCI/ PIO, Passport number is acceptable.

**** 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.

1. I/ We want the details of my/ our nominee to be printed in the statement of holding or statement of account, provided to me/ us by the AMC/ DP as follows; (please tick, as appropriate)

Name of Nominee(s)	Nomination (Yes/ No)	
1.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.	<input type="checkbox"/> Yes	<input type="checkbox"/> No

2. I hereby authorize _____ (Nominee No. ____) to operate my account on my behalf, in case of my incapacitation in terms of paragraph 3.5 of the Circular issued by the Securities and Exchange Board of India bearing Reference No. SEBI/HO/OIAE/OIAE_IAD-3/P/ON/2025/01650, dated January 10, 2025 ("**SEBI Circular**"). He/ She is authorized to encash my assets up to ____% of assets in the account/ folio or ₹ _____. (Optional) (strike off portions that are not relevant)
3. This nomination shall supersede any prior nomination made by me/ us, if any.
4. Signature(s) – As per the mode of holding in demat account(s)/ MF folio(s):

Name(s) of Holder(s)		Signature of Holder(s)/ Thumb Impression	Signature of two Witnesses*	Name of Witness & Address (wherever applicable)*
Sole/ 1 st Holder (Mr./ Mrs.)				

*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:


- If you are opening a new demat account/ MF Folios, you have to provide nomination. Otherwise, you have to follow procedure as per 3.10 of the SEBI 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, in case of your physical incapacitation, at any point of time and not just during opening of account/ folio. This mandate can be changed any time you choose.


- The signatories for this nomination form shall be as per mode of holding in the folio(s)/ demat account(s) i.e.
 - o 'Either or Survivor' Folios/ Accounts - any one of the holders can sign
 - o 'First Holder' Folios/ Accounts - only First Holder can sign
 - o 'Jointly' Folios/ Accounts - all holders have to sign


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.
- In case of a joint account/ folio, for transmission to the surviving joint holder(s) by name deletion, the surviving joint holder(s) shall have the option to update residential address(es), mobile number(s), email address(es), bank account detail(s), annual income and nominee(s), either along with transmission or at a later date. The regulated entity cannot seek KYC documents at the time of transmission, unless it was sought earlier but not provided by the holder.
- 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%
Total	100%		40%	60%	100%

 X _____
Sole / First Holder
Signature

 X _____
Second Holder
Signature

 X _____
Third Holder
Signature