

4. Nomination Details (Please tick ✓)

I/We do hereby nominate the undermentioned Nominee(s) to receive the Units allotted to my/our credit in my/our folio in the event of my/our death. I/We also understand that all payment and settlements made to such Nominee(s) and Signature of the Nominee(s) acknowledging receipt thereof, shall be a valid discharge by the AMC/Mutual Fund/Trustees.

OR

I/We hereby confirm that I/We do not wish to appoint any nominee(s) for my mutual fund units held in my/our mutual fund folio 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 issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

Nominee details	Nominee 1	Nominee 2	Nominee 3
Name			
Relationship with Primary Account Holder			
PAN or any other documents			
Date of Birth			
Proportion (%)*			
Name and the Address of the Guardian (to be furnished in case the nominee is minor)			
Relationship with Minor			
PAN of Guardian			
Signature of Guardian / Nominee			

* (%) by which the units will be shared by each nominee (% to aggregate to 100%)

Signature (s)

Signature	Attestation
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^Signature of minor who has turned major needs to be attested by parent/guardian whose signature is registered in the Mutual Fund records or by banker.

TERMS AND CONDITIONS

As per SEBI regulations when the units are held on behalf of the minor, the ownership of the units rests with the minor. A guardian shall operate the account until the minor attains the age of majority.

1. In the event of minor attaining majority, the existing standing instructions on SIP/STP/SWP shall be suspended when the minor attains majority, till the status is changed to major.. Prior to minor attaining majority, an advance notice will be sent to the registered Email ID /correspondence address advising the guardian to submit an application form (attached herewith) along with prescribed documents specified therein to change the status of the account to "major".
2. The account shall be frozen for operation by the guardian on the day the minor attains the age of majority and no further transactions shall be allowed till the status of the minor is changed to major.

