

## Annexure "F"

### NOMINATION FORM

Date : \_\_\_\_/\_\_\_\_/\_\_\_\_

Investment Approach Name:	
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Client Code	
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I/We do hereby nominate the person's more particularly described hereunder in respect of account (folio) held by me/us as provided herein.

I/We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the Portfolio Manager.

Nomination Details	NOMINEE 1	NOMINEE 2	NOMINEE 3
Name of Nominee			
Relationship with First Applicant			
Allocation %			
Proof of Identity / PAN No.			
Nominee Address			
Nominee Email			
Nominee Mobile			
Date of Birth (In case of Minor)			
Relationship with the Guardian			
Name of Guardian (In case of Minor)			
Guardian Address			
Guardian Contact Number			
Guardian PAN / Proof of Identity			
Guardian Date of Birth			
Guardian Email			
Details of Witness	Name of Witness	Address of Witness	Signature

- I. Applicants can nominate maximum up to 3 persons in whom all rights including beneficiary ownership and/or money payable in respect of portfolio shall vest in the event of death of holder(s), after due diligence and verification of valid documents of the nominee(s).
- II. A minor can be nominated and, in that event, the name and address of the guardian of the nominee shall be provided by the applicant. The applicant is advised that, in case of single holding the guardian to a minor nominee should be person other than the applicant.
- III. The nomination can be made only by individuals applying for /holding units on their own behalf singly or jointly in favor of one or more person.
- IV. Nomination forms cannot be signed by power of attorney.
- V. The nominee shall not be trust (other than religious or charitable trust), society, body corporate, partnership firm, Karta Hindu Undivided Family or a Power of Attorney holder.
- VI. A non-resident Indian can be a nominee subject to exchange controls in force, from time to time.
- VII. Nomination in respect of the portfolio stays rescinded upon closure of the portfolio management services account. Similarly, the nomination in respect of the security shall stand terminated upon transfer of the securities in favor of nominee(s) and shall be a valid discharge by the portfolio manager against legal heir.
- VIII. In case of dispute between applicant's nominee and any of his/her legal heirs and/or successor the portfolio manager shall be fully discharged of its liability and obligation if it pays the amount and/or securities that stand to the credit of his/her designated nominee(s).
- IX. The nomination will stand cancelled in the event of applicant's nominee pre-deceasing the client and it becomes obligatory up on the applicant to appoint another nominee(s).
- X. The portfolio manager reserves the right not to register the nomination in case of incomplete nomination in any respect.
- XI. Transfer of securities/payment of amount value of my/our credit to the nominee(s)/legal heirs will constitute a full and final discharge of the liability by the Portfolio manager.
- XII. I/we understand the nominee if required to be appointed for depository account, wherever applicable, should be the same as the nominee(s) appointed here in above.

Applicant	Sole/First Applicant	Second Applicant	Third Applicant
Name			
Signature			