

# Nomination Form



This form may be used to request a nomination in a specific folio in any Mutual Fund for which CAMS acts as Registrar and Transfer Agent. You can either enter information in this form and then print it, or simply print the blank form and fill it by hand; either way, please send the filled up form to a Service Centre as this is not an "Online" site.

[Print](#)

## FORM FOR NOMINATION / CANCELLATION OF NOMINATION *(to be filled in by individual(s) applying singly or jointly)*

Name of the Mutual Fund: \_\_\_\_\_

Date : DD/MM/YYYY

I/We, \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_ \* do hereby nominate the person(s) more particularly described hereunder / and / cancel the nomination made by me / us on the \_\_\_\_\_ day of \_\_\_\_\_ in respect of units held by me / us under Application / Folio No. \_\_\_\_\_ . (\*Strike out whichever is not applicable)

Name and Address of Nominee(s)	Date of Birth	Name and Address of Guardian	Signature of Guardian	Proportion(%) by which the units will be shared by each nominee (should aggregate to 100%)
Nominee 1	DD/MM/YYYY			
Nominee 2	DD/MM/YYYY			
Nominee 3	DD/MM/YYYY			

Name and Address of Applicant(s)	Signature of Applicant(s)
Sole/First Applicant	
Second Applicant	
Third Applicant	

(To be signed by **'All Applicants'** if mode of holding is **'Joint'**)

### INSTRUCTIONS

1. The nomination can be made only by individuals applying for / holding units on their own behalf singly or jointly. Non-individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided family, holder of Power of Attorney cannot nominate. If the units are held jointly, all joint holders should sign the Nomination Form
2. Minor(s) can be nominated and in that event, the name, address and signature of the guardian of the minor nominee(s) shall be provided by the unitholder. 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.
3. The Nominee shall not be a trust, society, body corporate, partnership firm, Karta of Hindu Undivided Family or a Power of Attorney holder. A non-resident Indian can be a nominee subject to the exchange control regulation in force, from time to time
4. Nomination in respect of the units stands rescinded upon the transfer of units.
5. Nomination can be made for maximum number of three nominees. In case of multiple nominees, the percentage of allocation/share in favour of each of the nominees should be indicated against their name and such allocation/share should be in whole numbers without any decimals making a total of 100 percent.

If the aggregate is less than 100% then the balance will be re-balanced to the first unitholder. If the aggregate is greater than 100% then nomination would be rejected.

In the event of the Unitholders not indicating the percentage of allocation/share for each of the nominees, Mutual Fund / Asset Management Company, by invoking default option shall settle the claim equally amongst all the nominees.

6. Transfer of units in favour of Nominee(s) shall be valid discharge by the Asset Management Company against the legal heir.
7. The cancellation of nomination can be made only by those individuals who hold units on their behalf singly or jointly and who made the original nomination
8. On cancellation of the nomination, the nomination shall stand rescinded and the Asset management Company shall not be under any obligation to transfer the units in favour of the Nominee(s).