multi asset, multi manager

quant mutual

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NOMINATION FORM

(For use only by Individual Unit Holders for registering a Nominee or cancelling an existing Nomination), To be filled in capital letters and in blue / black ink only.

Folio No.

1. REGISTRATION OF NOMINATION DETAILS (Please strike out if your request is not for registration of Nominee)

I / We

do hereby nominate the undermentioned Nominee to receive the Units allotted to my / our credit in my folio in the event of my / our death. I / We also understand that all payments and settlements made to such Nominee and Signature of the Nominee aknowledging receipt thereof, shall be a valid discharge by the AMC / Mutual Fund / Trustees. This instruction supercedes all previous nominations made by me in respect of the Folio indicated above.

1st Nominee Name

Address

City Pincode

State Country

Allocation % Relationship

Date of Birth (in case Nominee is a minor) D D M M Y Y Y Y

Guardian details to be furnished in case Nominee is a Minor (strike out if not applicable)

Name

Address

City Pincode

State Country

Signature of Guardian (Mandatory) _____

2nd Nominee Name

Address

City Pincode

State Country

Allocation % Relationship

Date of Birth (in case Nominee is a minor) D D M M Y Y Y Y

Guardian details to be furnished in case Nominee is a Minor (strike out if not applicable)

Name

Address

City Pincode

State Country

Signature of Guardian (Mandatory) _____

3rd Nominee Name

Address

City Pincode

State Country

Allocation % Relationship

Date of Birth (in case Nominee is a minor) D D M M Y Y Y Y

ACKNOWLEDGEMENT

Received from _____1st Applicant_____, _____2nd Applicant_____ & _____3rd Applicant_____ an application for

☐ Registration of Nominee ☐ Cancellation of Nominee in Folio no. _____.

Guardian details to be furnished in case Nominee is a Minor (strike out if not applicable)

Address

City Pincode

State Country

Signature of Guardian (Mandatory) _____

2. CANCELLATION OF NOMINATION (Please strike out if your request is not for cancellation of Nomination)

I/We

do hereby cancel the nomination made by me / us in favour of the under mentioned in respect of Units held by me / in the above referred Folio

Nominee 1

Guardian Name

Nominee 2

Guardian Name

Nominee 3

Guardian Name

(If the mode of holding is single & the existing nomination(s) is cancelled without any further nomination, it shall be construed as a deemed consent of that investor for not having any nominee in the existing folio.)

3. UNIT HOLDER(S) SIGNATURE(S) (Mandatory)

(ALL UNIT HOLDERS must sign here)

Date D D M M Y Y Y Y

First / Sole Applicant / Guardian/ Authorised Signatory	Second Applicant/ Authorised Signatory	Third Applicant/ Authorised Signatory

INSTRUCTIONS

As per SEBI regulation, you can assign a nominee to the investment, to whom the amounts will be payable on death of the sole or all Unit Holders as the case may be.

A) 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 HUF, holder of POA cannot nominate.

B) A minor can be nominated and in that event, the name and address of the guardian of the minor nominee shall be provided by the Unit Holder. 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.

C) The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undividend Family or a Power of Attorney holder. A non-resident Indian can be a Nominee subject to the exchange control regulations in force, from time to time.

D) Nomination in respect of the stands rescinded upon the transfer of units.

E) Transfer of units in favour of a Nominee shall be valid discharge by the AMC against the legal heir.

F) The cancellation of nomination can be made only by those individuals who hold units on their own behalf singly or jointly and who made the original nomination. 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.

G) The maximum number of nominees shall be limited to 3 (three)

H) In the event of the Unitholders not indicating the percentage of allocation/share for each of the nominees, the AMCs, by invoking default option shall settle the claim equally amongst all the nominees.

I) Nomination is mandatory for folios opened by individuals with single mode of holding.

J) Where a folio has joint holders, all joint holders should sign the request for Nomination/cancellation of nomination, even if the mode of holding is not "joint"

K) Power of Attorney (POA) holder cannot sign the Nomination form.

L) Nomination is not allowed in a folio held on behalf of a minor.

M) Nomination is maintained at the Folio level and not at the Scheme level.