

# NOMINATION FORM

(Form for Registration / Cancellation of Nomination)

**Sponsor:** Edelweiss Financial Services Limited. **Trustee Company:** Edelweiss Trusteeship Company Limited. **Investment Manager:** Edelweiss Asset Management Limited.  
Tower 3, Wing B, Ground Floor, Kohinoor City Mall, Kohinoor City, Kirod Road, Kurla (W), Mumbai - 400070. **Website:** www.edelweissmf.com

## 1 INVESTOR / UNIT HOLDER DETAILS

Name of Sole / First Applicant

Name of Second Applicant

Name of Third Applicant

## 2 NOMINATION DETAILS (TO BE FILLED IN BY INDIVIDUAL(S) APPLYING SINGLY OR JOINTLY)

I / We do hereby nominate the person(s) more particularly described hereunder / and / cancel the nomination made by me / us in respect of units held by me / us under Folio No.\*  or Application No.

I / We also understand that all payments and settlements made to such nominee and signature of the nominee acknowledging receipt thereof shall be a valid discharge by the AMC / Fund / Trustees.

## 3 PARTICULARS

Particulars	Nominee 1	Nominee 2	Nominee 3
Name of Nominee			
Address with City & Pin Code			
Name & Address of Guardian (In case nominee is minor)			
Nominee's Relation with Applicant			
% of Allocation** (should not be in decimals)			
Date of Birth (DD-MM-YY)			
PAN of Nominee/Guardian (In case nominee is minor)			
Signature of Nominee/ Guardian			

\* The above nomination details supersede all the earlier nominations provided by the investor in the said folio. \*\*Please refer instruction no. 2 & 3 overleaf

☐ I / We confirm having read and understood the rules & Instructions contained overleaf and agree to compile with and adhere to such rules or any amendments that may be made time to time.

SIGNATURE/S

First/Sole Applicant / Guardian

Second Applicant

Third Applicant



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## INSTRUCTIONS FOR NOMINATION

The investors are requested to take note of the following instructions while providing Nomination Details for investments in Edelweiss Mutual Fund:

1. The investor has an option to provide nomination details of maximum up to 3 (Three) Nominees.
2. Please indicate the percentage of allocation / share for each of the nominees in whole numbers only without any decimals making a total of 100 percent. In case of any percentage allocation being in decimals, the same shall be rounded off by the AMC to nearest integer in such a way to make a total of 100 percent.
3. In the event of the Unit holders not indicating the percentage of allocation / share for each of the nominees, the AMC, by invoking default option shall settle the claim equally amongst all the nominees.
4. 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 will sign the nomination form.
5. A minor can be nominated and in that event, the name, address and PAN details of the Guardian will have to be provided.
6. The Nominee shall not be a trust (other than religious or charitable trust), 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 controls in force, from time to time. Nomination can also be made in favor of the Central Government, State Government, Local Authority or any person designated by virtue of his office.
7. Nomination in respect of the Units stands rescinded upon the redemption / transfer / transmission of Units.
8. Transmission of Units in favour of a Nominee(s) shall be valid discharge by the AMC / Fund / Trustees against the legal heir. However, the Mutual Fund / Trustee/ AMC may request the nominee to execute suitable indemnities in favor of the Fund and / or the Trustee and / or the AMC, and to submit necessary documentation to the satisfaction of the Fund before transmitting Units in his / her favour.
9. Nominations received in the form prescribed by the AMC alone shall be valid.
10. The AMC holds the right to ask for identity proof(s) of the nominee(s) whenever required as per KYC requirements.
11. 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.
12. On cancellation of the nomination, the nomination shall stand rescinded and the AMC / Fund / Trustees shall not be under any obligation to transmit the Units in favour of the Nominee.
13. In case of units held in dematerialized form the nomination details as available with the Depository Participant will be applicable to the holdings of the scheme.
14. In case of change in percentage of allocation / share for each nominee please forward an application for the same duly signed by all the unit holders as per holding basis or the above form duly filled and signed.