



FORM FOR NOMINATION/OPTING-OUT OF NOMINATION

In respect of the Units bearing Folio No.

First Holder	<input type="text"/>	PAN	<input type="text"/>
Second Holder	<input type="text"/>	PAN	<input type="text"/>
Third Holder	<input type="text"/>	PAN	<input type="text"/>

NOMINATION DETAILS

I / We hereby nominate the following person(s) who shall receive all the assets held in my / our account / folio in the event of my / our demise, as trustee and on behalf of my / our legal heir(s)*

Name of the Nominee 1* **Nomination (%)***

Relationship with applicant* **Mobile Number***

Email ID* **Residential Address***

Pincode*

Proof of Identity* ☐ Pan ☐ Driving Licence ☐ Aadhar ☐ Passport number in case of NRI/ OCI/ PIO **Identification No***

Nominee / Guardian (In Case of Minor) **DOB***

Name of the Nominee 2* **Nomination (%)***

Relationship with applicant* **Mobile Number***

Email ID* **Residential Address***

Pincode*

Proof of Identity* ☐ Pan ☐ Driving Licence ☐ Aadhar ☐ Passport number in case of NRI/ OCI/ PIO **Identification No***

Nominee / Guardian (In Case of Minor) **DOB***

Name of the Nominee 3* **Nomination (%)***

Relationship with applicant* **Mobile Number***

Email ID* **Residential Address***

Pincode*

Proof of Identity* ☐ Pan ☐ Driving Licence ☐ Aadhar ☐ Passport number in case of NRI/ OCI/ PIO **Identification No***

Nominee / Guardian (In Case of Minor) **DOB***

*All fields are mandatory.

I / We want the details of my / our nominee to be printed in the statement of holding, provided to me/ us by the AMC as follows; (please tick, as appropriate)

☐ Name of nominee(s) ☐ Nomination: Yes/No

DECLARATION FOR OPTING-OUT OF NOMINATION

☐ I / We hereby confirm that I / We do not wish to appoint any nominee(s) 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 / information for claiming of assets held in my / our Mutual Fund Folio, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the Mutual Fund Folio.

This nomination shall supersede any prior nomination made by me / us, if any.

Name and Signature of Holder	Signature(s) of holder/ Thumb impression	Witness Name and Address**	Witness Signature**
Sole / First Holder _____			
Second Holder _____			
Third Holder _____			

** Signature of two witness(es), along with name and address are required, if the account holder affixes thumb impression, instead of wet signature.

OLD BRIDGE
ASSET MANAGEMENTACKNOWLEDGEMENT FOR
FORM FOR NOMINATION/OPTING-OUT OF NOMINATIONDate

Received, subject to verification, form for Nomination/Opting-out of Nomination

Folio Nos. Mr./Mrs./Ms.

Stamp & Signature

FORM FOR NOMINATION/OPTING-OUT OF NOMINATION

TERMS & CONDITION

- Nomination will be updated at folio/account level. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio/account.
- Nomination is not allowed for the folios/accounts opened in favour of minors.
- Request for nomination must be signed by all holders in the folios (i.e., in case of multiple unit holders in the folio) irrespective of mode of holding in the folio.
- A minor may be nominated in a folio, DOB is mandatory for minor. In that event, the name and address of the Guardian of the minor nominee needs to be provided.
- The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family or a Power of Attorney holder.
- Every new nomination for folio/account shall over write the existing nomination, if any.
- Nomination can also be in favour of Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.
- A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
- The nomination can be made only by individuals applying for holding units on their own behalf singly or jointly. Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unit holder cannot nominate.
- Nomination shall stand rescinded upon the transfer of units.
- Death of Nominee/s: In the event of the nominee(s) pre-deceasing the unit holder(s), the unit holder/s is/are advised to make a fresh nomination soon after the demise of the nominee. The nomination will automatically stand cancelled in the event of nominee(s) pre-deceasing the unit holder(s). In case of multiple nominations, if any of the nominee is deceased at the time of death claim settlement, the said nominee's share will be distributed equally amongst the surviving nominees.
- Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund/ Trustees against the legal heir(s).
- Cancellation of Nomination: Request for cancellation of Nomination can be made only by the unit holders. The nomination shall stand rescinded on cancellation of the nomination and the AMC shall not be under any obligation to transfer/transmit the units in favour of the Nominee.
- Unit holders who do not wish to nominate are required to confirm the same by indicating their choice in the space provided in the nomination form.
- All new investors/unit holders shall continue to be required to mandatorily provide the 'Choice of Nomination MF Folios (except for jointly held Mutual Fund Folios).
- In respect of folios/accounts where the Nomination has been registered, the AMC will not entertain any request for transmission/claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.
- Nomination shall be mandatory for single holding only. The requirement of nomination shall be optional for jointly held accounts/folios.
- Power of Attorney (POA) Holders (S) of the investor cannot nominate.
- Investors can nominate up to 3 persons in the account / folio.
- Investor can make nomination or change nominee any number of times without any number of times without any restriction.
- You have option to designate any one of your nominees to operate your account / folio, if case of your physical incapitation. This mandate can be changed any time you choose.

Event	Transmission of Account / Folio to
Demise of one or more joint holder(s)	Surviving holder(s) through name deletion The surviving holder(s) shall inherit the assets as owners.
Demise of all joint holders simultaneously - having nominee	Nominee
Demise of all joint holders simultaneously - not having nominee	Legal heir(s) of the youngest holder