NOMINATION FORM

Applicable for Individual Unitholders only (Single/Joint).

Please read the instructions carefully before filling up this form.

Folio No.

Name of 1st Holder

Name of 2nd Holder

Name of 3rd Holder

☐ **I/We wish to nominate:** 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).

I/ We want the details of my/ our nominee to be printed in the statement of account, provided to me/us by the AMC as follows: **(Mandatory in case Nomination is provided)**

○ Name of Nominee(s) ○ Nomination Status* (Yes/No) * Default

Mandatory				Optional		
S. no.	Nominee Name	Relationship with Applicant	Date of Birth (Mandatory if Nominee is minor)	% Share of nominee** (equal share if % is not specified)	Mobile & Email of nominee*** (AMC will be able to reach out to your nominee if you provide the contact details)	Specify Personal identifier document Aadhaar (last four digit), PAN, Driving Licence, Passport ***
1					Email ID Mobile	
2					Email ID Mobile	
3					Email ID Mobile	

**Any odd lot after division shall be transferred to the first nominee mentioned in the form.

*** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.

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

2) Name & Signature of Holders (all the holders need to sign irrespective of mode of holding)

Name	Name	Name
Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder

Name of Witness	Name of Witness	Name of Witness
1 2	1 2	1 2
Address	Address	Address
1 2	1 2	1 2
Signature of 2 Witness	Signature of Witness	Signature of Witness
1 2	1 2	1 2

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

Online: validate through Digital Signature Certificate or Aadhaar-based e-sign or by using any other e-sign facility recognized under Information Technology Act, 2000 or two factor authentication (2FA) in which one of the factors shall be a One-Time Password (OTP) sent to the registered mobile number and email address.

Physical / offline: wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses (name and address) shall be duly provided in this form.

Acknowledgement Slip (To be filled in by the Investor) **Form for Fresh Nomination / Opt-out**

Application No.

Received from: Mr./ Ms. /M/s.

Date : D D M M Y Y Y Y

Collection Centre / ABSLAMC Stamp & Signature

INSTRUCTIONS

1. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
2. Who can Nominate:

   The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.

   Nomination is not allowed for :

   Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder. Nomination is not allowed in a folio of a Minor unitholder.
3. Multiple Nominees: Nomination can be made in favour of multiple nominees, subject to a maximum of Three nominees. In case of multiple nominees, the percentage of the allocation/share should be in whole numbers without any decimals, adding upto a total of 100%. If the total percentage of allocation amongst multiple nominees does not add up to 100%, the nomination request shall be treated as invalid and rejected. If the percentage of allocation/ share for each of the nominee is not mentioned, the allocation /claim settlement shall be made equally amongst all the nominees.
4. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
5. Nomination shall stand rescinded upon the transfer of units.
6. Death of Nominee/s: In the event of the nominee(s) pre-deceasing the unitholder(s), the unitholder/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 the nominee(s) pre-deceasing the unitholder(s). Upon demise of one of the nominees prior to the demise of the investor and if no change is made in the nomination, then the assets shall be distributed to the surviving nominees on pro rata basis upon demise of the investor. Any odd lot after division / fraction of %, shall be transferred to the first nominee mentioned in the nomination form.
7. 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).
8. The nomination will be registered only when this form is valid and complete in all respects.
9. 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.
10. In absence of nomination, the regulated entity shall transmit the assets in the account / folio to either the legal heir(s) or legal representative(s) of the holders as per the rules of intestate succession or as per the Will of the latter, as the case may be, after following the prescribed procedure
11. Rights, Entitlement and Obligation of the investor and nominee:
    - If your are opening a new MF folios, you have to provide nomination.
    - You can make nomination or change nominee any number of times without any restriction.
    - You are entitled to receive acknowledgement from the AMC for each instance of providing or changing nomination.
    - Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single account / folio.
    - In case all your nominees do not claim the MF Units from the AMC, then the residual unclaimed MF Units shall continue to be with the AMC.
    - The signature of all the joint holders shall be obtained for providing / changing nomination regardless of mode of operations.
12. Transmission aspects
    - AMCs shall transmit the folio / account to the nominee(s) upon receipt of 1) copy of death certificate and 2) completion / updation of KYC of the nominee(s). The nominee is not required to provide affidavits, indemnitites, undertakings, attestations or notarization.
    - In case of a joint account / folio, for transmission to the surviving joint holder(s) by name deletion, the surviving joint holder(s) shall have the option to update residential address(es), mobile number(s), email address(es), bank account detail(s), annual income and nominee(s), either at the time of transmission or at a later date. The regulated entity cannot seek KYC documents from the surviving joint holder(s) at the time of transmission, unless it was sought earlier but not provided by the holder(s).
    - Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC.
    - In case of multiple nominees the assets shall be distributed pro-rata to the surviving nominees, as illustrated below. Any odd lot after division / fraction of %, shall be transferred to the first nominee mentioned in the nomination form.

% share as specified by investor at the time of nomination		**% share to be appointed to surviving nominees upon demise of investor and nominee 'A'**			
Nominee	**% Share**	**Nominee**	**% initial share**	**% of A's share to be appointed**	**Total % share**
A	60%	A	0	0	0
B	30%	B	30%	45%	75%
C	10%	C	10%	15%	25%
Total	**100%**	**-**	**40%**	**60%**	**100%**

Baroda BNP PARIBAS MUTUAL FUND

Baroda BNP Paribas Asset Management India Private Limited
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