

INSTRUCTIONS FOR NOMINATION

1. Nomination shall be registered only if the form is filled completely.
2. Where the units are held by more than one person jointly, the joint unit holders may together nominate maximum of three nominees for a particular folio. It is mandatory to indicate clearly the percentage of allocation/share in favour of each of the nominees against their name and such allocation/share should be in whole numbers without any decimals making a total of 100%.
3. In the event of such allocation not being clearly mentioned for each of the nominees, the AMC shall invoke the default option and shall settle the claim equally amongst all the nominees.
4. The Nomination can be made only by individuals applying for / holding unit on their own behalf singly or jointly. No person other than an individual including but not limited to a company, body corporate, PSU, AOP, BOI Society, Trust, Partnership Firm, Karta of HUF, Banks, FIs and holders of POA can nominate.
5. No person other than an individual but not limited to a company, body corporate, PSU, AOP, BOI, Society, Trust, Partnership Firm, Karta of HUF, Banks, FIs and holders of POA can be a nominee. A minor can be nominated and in that event the name, address and PAN number of the guardian of the minor nominee shall be provided by the Unit holder. If no guardian is provided, nomination of minor will be invalid. A NRI can be nominee subject to the exchange controls in force from time to time.
6. Nomination in respect of the Units stands rescinded upon the redemption of Units.
7. Transfer of Units / payments to the nominee(s) shall be valid and effectual discharge by the AMC/Trust of all liability towards the estate of the deceased Unit holder against the legal heir.
8. In case of different nominee(s) being provided by the investor at the time of additional investments, the earlier nominee(s) registered by the AMC for the folio shall be overwritten by the new nominee(s) provided.
9. On cancellation of nomination, where multiple nominees have been selected the nomination shall be cancelled for all the nominees and not for one or more of the multiple nominees, in case such a request has been provided by the investor.
10. On cancellation of the nomination, the nomination shall stand rescinded and the AMC/Trust shall not be under any obligation to transfer the Units in favour of the nominee(s).

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