

## How to add a Nominee Online?

**Please note:** This process is only for single account holders, If you have multiple holders on the account, please submit the following documents at the nearest Axis Bank branch:

1. The Multiple Nomination Form (Click Here to download)

**Step1:** <u>Click Here</u> to login to your account, You would get the following pop up to update nomination is not updated in your account, if already updated and you wish to change the details select '**My Account**' from the '**Take Me To**' dropdown and click on the '**Add Nomination**' tab

	OFFERINGS	MARKETS	RESEARCH	LEARN	INVESTING	SWIFT TRADE	COMMODITIES	Q Quotes	OPEN AN /
Dear Cu that yo	istomer, as pe ur nominee de	r SEBI regula etails still nee nomii	tions, updating d to be added. nee details/de	g your nom . Therefore claration fo	inee details fo , to avoid the f or opting out o	r your demat & to reeze of your acc f the nomination	rading a/c is mandat count with us, we ur; by Sep 30, 2023	ory. However, plea ge you to kindly ac	ase note 1d your
		Ado	l Nominee				Skip		
- Crimoton	Journeeounth	011				11:59 PM of 27 J	ul 2023.		

If already updated and you wish to change the details select 'My Account' from the 'Take Me To' dropdown and click on the 'Add Nomination' tab

Login	MY ACCOUNT	
Forgot Username / New user registration	Mobile No.* :	
Enter Password	Email D* :	
	PAN :	
Your Date Of Birth	Aadhar :	
·· /·· /···· 9	GST Number :	
Take Me To	Bithday :	
Trading	Marital Status* :	
Trading	CKYC Number :	
My Portfolio		
My Account	Add Nomination	
Investing		



**Step2:** If you are nominating someone on your account for the first time, the system will ask you to either Opt Out or update nomination choose your desired option and click on '**Proceed**'

		Welcome
		View History of Online Nomination
Demat Account	Trading Account	
IN304295XXXXXXXX (Default)	XXXXXXX	
a. You currently do not have any Nominations. b. Nomination will enable seamless transfer of proceeds in y	our account to added nominee in case of unexpected ev	ent.
I wish to nominate	for demat accounts, trading accounts and MF.	
	O Yes ○ Opt Out	
	Proceed	

**Step4:** Fill in the details of Nomination in the online form, in case the nominee stays on the registered address on the account, you can pre fill the details by click on 'Same as account holder' if you wish to add more than 1 nominee you can click on the 'Add Nomination' and fill in the details, once you have updated the details click on the 'Confirm Changes' tab

Nominee Demat ID : N304295XXXXXXXX (Def	ault) Trading ID	20000000				Back
						Edit 🕼 Add 🕇
First Nominee Details						^
First Name* First Name		Middle Name Middle Name		Last Name* Last Name		
Date of Birth* Date of Birth						
Same as account holder						
Address 1 Address 1		Address 2 Address 2		Address 3 Address 3		
Pincode* Pincode	State* State		City* City		Country* Country	
Relationship With Applicant* Select.  V	Percentage of S O	hares*				
Add Nomination +						
				l	Reset Form	Confirm Changes



**Step5:** A pre- filled form as shown in the image below will pop up, please check the details, once confirmed scroll right at the bottom of the form to find **'I wish to nominate Demat & Trading/MFD account [As per details given below]**' disclaimer accept the disclaimer if you agree and then click on **'Proceed'** 

	(Tech	FORM FOR NOMINA	ittion ng singly or igintly)	
			ng angiy on janoy)	
ienin	ation Registration No. ON_1255301_3	0230727143706	Date:	2710712023
N	SOL DP ID	4 2 0 5	<ul> <li>Trading ID</li> </ul>	
c			<ul> <li>Demat Client ID</li> </ul>	
•	NATION OPTION	tere that		
ve :	I wish to nominate Demat & Trading Ac	are that : count (As per details given be	iow]	
	1 / We hereby confirm that I / We do not issues involved in non-appointment of r	wish to appoint any nominee cominee(s) and further are au	(s) in my / our trading / vare that in case of dea	demat account and understand the h of all the account holder(s), my /
	our legal heirs would need to submit all demat account, which may also include	the requisite documents / inf documents issued by Court	ormation for claiming of or other such competer	assets held in my / our trading / t authority, based on the value of
	assets held in the trading / demat accor	26.		
As a	whittom be twice wish to ma a nomination and do hereby n s in the said hereficiery owner account is	ominate the following person)	(a) who shall receive all This corrigation shall a	securities held in the Depository by
me	lus and also any testamentary document	executed by me / us.		
mi	nation can be made upto three nomine	es in the account. Details of 1st Nominee	Details of 2nd Nom	inee Details of 3rd Nominee
1	Name of the nominee(s) (Mr. Ms. (Others)	******		
	First Name			
	Last Name			
2	Share of each Nominee			
A)	For NSDL			
	[If not equally, please specify	100		
	Any odd lot after division shall be transf	lerred to the first nominee me	ntioned in the form.	
8)	For CDSL			
	Percentage of allocation of securities			
	Residual Securities (Please tick any			
	default will be first nominee):			•
	Note: Residual securities in case of mu	tiple nominees please choos	e any one nominee wh	will be credited with residual
	the firs nominee will be marked as nom	ince entitled for residual share	es, if any.	
з	Relationship with the Applicant (if any)	Spouse		
_	Country:	INDIA		
8 0	Mobile/Telephone No. of nominee(s) Fax No.			
7	Email ID of nominee(s)			
1	Nominee identification details - [Please tick any one of following and			
	provide details of same) Photograph & Signature			
	O PAN			
	Aadhaar / UID			
	Proof of Identity			
	Demat Account No.			
0	Deta of Birth			
	Age	31		
	Sr. Nos. 10-16 should be filled mandate	rily if nominee(s) is a minor:		
10	Name of Guardian (Mr.Ms./Others)			
	Middle Name			
12	Mobile/Telephone No. of Guardian			
13				
14	Fax No.			
14 15	Pax No. Email ID of Guardian Relationship of Guardian with			
14	Pac No. Email ID of Guardian Relationship of Guardian with nominee Guardian Proof of Identity			
14 15 16	Pac No. Email to d'Ouardian Ratatonahip of Guardian with ninninea Guardian Proof of Identity			
16	Piec No. Email ID of Quardian Relationship of Quardian with nominee Guardian Proof of Identity			
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I wish to nominate Demat & Trading / MFD account (As per details given below)

I wish to nominate Demat & Trading / MFD account [As per details given below]

Download Form Proce

Form Proceed



**Step6:** A success message would show up and the following pop confirms that your nomination request has been taken

AXIS DIRECT				
			Welcome	Logout
	Your nomination request is under to process your request. Wil	process. It will take 3 working days I keep you updated via email		
	Request type	Opted for Nominee		
	Status	Submitted		
	Remarks	Opted for Nominee		
	Request date & time	07/27/2023 14:37		
	Back to N	lominaton		

## **Check Status:**

Login to your account and select 'My Account' from the 'Take Me To' dropdown and then click on the 'Add Nomination' tab, once you do that red 'View History of Online Nomination' link as shown in the image below

			View History of O	nline Nomination
Demat Account IN304295XXXXXXXXX (Defau	lt)		Trading Account	
Ref No: ON_1255301_2023072714370	06 - OPT_IN	Status : submitted		View
Nominee 1 First Name XXXXXXX Address 1 XXXXXXX XXXXXXXX	Middle Name XXXXXXXX Address 2 XXXXXXX XXXXXXXX	Last Name XXXXXXXX Address 3	Date of Birth XXXXXXX City XXXXXXX	
State XXXXXXXX Relationship XXXXXXX	Country	Pincode	Percentage of Share	
		Cancel Request		

The Following page would show up, if the status says '**Submitted**' that means your request is under process, if it says '**Rejected**' it is rejected and the reason will be shared with you on your registered E-mail ID, if the status says '**Downloaded**' it is processed, if you click on the '**Nominee Details**' link you would be able to view the nominee details in a pop up as shown below

				Welcome	Logout
<u> </u>	Online Nomination History				
	Ref No ON_1255301_20230727143706	Created At Jul 27, 2023 - 02:06 pm	Status submitted	Nominee Details	
	Rel No ON_1255301_20230727143706	Created At Jul 27, 2023 - 02:06 pm	Status submitted	Nominee Details	
					Back



## Nominee Details pop up

Nominee 1			
First Name	Middle Name	Last Name	Date of Birth
XXXXXXXX	XXXXXXX	XXXXXXXXX	XXXXXXX
Address 1	Address 2	Address 3	City
XXXXXXXX XXXXXXXXX	XXXXXXXX XXXX	XXX	XXXXXXXX
XXXXXXX	XXXXXXXX		
otate	Country	Pincode	Percentage of Share
XXXXXXX	XXXXXXX	XXXXXXX	XXXXXXX
Relationship			
****			

END