AXIS DIRECT

Nomination form

Annexure-A

(To be filled in by individual applying singly or jointly)

Date: D D M M Y Y Y Y

NSDL ☐ CDSL ☐ (Please select any one)

Trading ID

NSDL DP ID I N 3 0 4 2 9 5

CDSL DP ID 1 2 0 4 9 2 0 0

Demat Client ID

Mandatory Details

☐ 1. I / We wish to make nomination [as per details given below] (You can nominate upto 3 persons)

	Details	1st Nominee	2nd Nominee	3rd Nominee
1	Name of the nominee*			
2	Relationship with the Applicant*			
3	Date of Birth*			

2. I want the following nomination details to be printed in the account / holding statements (tick one of the boxes below):

☐ Name of the Nominee(s)

☐ Whether nomination given: Yes / No (not name of the nominee)

3. Optional details of nomination:

	Details	1st Nominee	2nd Nominee	3rd Nominee
a	% Share of nominee** (equal share if % is not specified)			
b	Mobile of nominee/guardian*** (Please note that the DP / MF RTA will be able to reach out to your nominee /guardian*** if you provide the contact details)			
c	Email ID of nominee/ guardian*** (Please note that the DP / MF RTA will be able to reach out to your nominee/guardian*** if you provide the contact details)			
d	Specify Personal identifier document • Aadhaar (last four digit), PAN, Driving Licence, Passport of nominee/ guardian***			

**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.

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Name & Signature of Account Holder(s)			
Name(s) of holder (s)			
Signature(s) of holder (s) / thumb impression	(1st / Sole Holder)	(2nd Holder)	(3rd Holder)

Details of Witness for Nomination

Name of the Witness		
Address of Witness		
Signature of Witness		
Place :		Date D D M M Y Y Y Y

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

Note:

- Investors can provide, changes or cancel nominations any number of times.
- The signature of all the joint holders shall be obtained for providing / changing nomination regardless of mode of operations.
- This nomination shall supersede any prior nomination made by the investor(s), if any.
- Investor have the right to receive acknowledgement of the nomination form for each instance of nomination / subsequent change.

AXIS DIRECT

Nomination form

Annexure-B

(To be filled in by individual applying singly or jointly)

Date: D D M M Y Y Y Y

NSDL ☐ CDSL ☐ (Please select any one)

Trading ID

NSDL DP ID I N 3 0 4 2 9 5

CDSL DP ID 1 2 0 4 9 2 0 0

Demat Client ID

Declaration for Opting-out of Nomination

☐ I hereby confirm that I do not wish to appoint any nominee(s) to my demat account/ mutual fund folio at this point of time.

I understand that –

(i) the nomination helps to quickly identify the person for transfer of securities and helps in faster and smoother transmission of my securities to my legal heir(s) after my demise.

(ii) in the absence of a nomination, my legal heir(s) may require the submission of certain additional legal or court-issued documents which may delay the process of transmission of securities to my legal heir(s).

(iii) if no claim is made on the account / folio for a prolonged period after my demise, the holdings may be treated as unclaimed assets and they may be transferred to Investor Education and protection Fund Authority (IEPF) in accordance with the applicable regulatory framework.

I confirm that I have understood the above implications and that my decision to opt out of nomination is voluntary.

Name & Signature of Account Holder(s)			
Name(s) of holder (s)			
Signature(s) of holder (s) / thumb impression	(1st / Sole Holder)	(2nd Holder)	(3rd Holder)

Details of Witness for Nomination		
Name of the Witness		
Address of Witness		
Signature of Witness		
Place :		Date D D M M Y Y Y Y

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