

**Trustee:** Tata Trustee Company Ltd. **Investment Manager:** Tata Asset Management Ltd.  
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**Form for Nomination / Cancellation of Nomination**  
 (to be filled in by individual(s) applying singly or jointly)

Date: \_\_\_\_\_

I/We ..... <sup>Unitholder - 1</sup> ..... and ..... <sup>Unitholder - 2</sup> .....  
 and ..... <sup>Unitholder - 3</sup> ..... \* do hereby nominate the person(s) more particularly described hereunder / and\* /  
 cancel the nomination(s) made by me / us on the ..... day of ..... in respect of the units held under Folio bearing No.  
 [ ] (\* strike out which is not applicable). I / We do hereby nominate the under mentioned nominee to receive the Units  
 allotted to me / our credit in my folio in the event of my / our death. I / We understand that all payments and settlements made to such Nominee and Signature of the  
 Nominee acknowledging receipt thereof, shall be a valid discharge of the AMC / Mutual Fund / Trustees.

Sr. No.	Name of the Nominee (s)	% of Allocation / Share in favour of each Nominee (should be whole numbers without decimals making a total of 100%)	
		(In Figures)	(In Words)
1.			
2.			
3.			

**1) Name and Address of Nominee**

Name .....

Address .....

Nominee's relationship with the 1st unitholder ..... Date of Birth: .....

Proof of DOB:  Birth Certificate  School Leaving Certificate  Passport  Others .....

The Nominee is a minor whose guardian is: .....

Name & Address of Guardian: .....

Relationship of the Nominee with the Guardian  Mother  Father  Legal Guardian

Proof of relationship:  Birth Certificate  School Leaving Certificate  Passport  Others .....

Signature of the Guardian/Nominee

**2) Name and Address of Nominee**

Name .....

Address .....

Nominee's relationship with the 1st unitholder ..... Date of Birth: .....

Proof of DOB:  Birth Certificate  School Leaving Certificate  Passport  Others .....

The Nominee is a minor whose guardian is: .....

Name & Address of Guardian: .....

Relationship of the Nominee with the Guardian  Mother  Father  Legal Guardian

Proof of relationship:  Birth Certificate  School Leaving Certificate  Passport  Others .....

Signature of the Guardian/Nominee

**3) Name and Address of Nominee**

Name .....

Address .....

Nominee's relationship with the 1st unitholder ..... Date of Birth: .....

Proof of DOB:  Birth Certificate  School Leaving Certificate  Passport  Others .....

The Nominee is a minor whose guardian is: .....

Name & Address of Guardian: .....

Relationship of the Nominee with the Guardian  Mother  Father  Legal Guardian

Proof of relationship:  Birth Certificate  School Leaving Certificate  Passport  Others .....

Signature of the Guardian/Nominee

Signature of 1st Unitholder	Signature of 2nd Unitholder	Signature of 3rd Unitholder
Name of 1st Unitholder	Name of 2nd Unitholder	Name of 3rd Unitholder

## INSTRUCTIONS

As per SEBI regulations, you can assign a nominee to the investments, to whom the amounts will be payable on death of the some or all Unit holders as the case may be. It is mandatory to fill this section and sign in the specified place; even if you do not wish to nominate anybody it is mandatory for you to select the option for the same. If you wish to appoint multiple nominees please fill up the Application Form for Multiple Nominations and submit it along with this form.

- (1) The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly. Non-Individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided Family, holder of Power of Attorney cannot nominate. If the units are held jointly, all joint holders will sign the nomination form.
- (2) Minor(s) can be nominated & in that event, the name, address & signature of the guardian of the minor nominee(s) shall be provided by the unit holder.
- (3) The nominee shall not be a trust (other than religious and charitable trust), society, body corporate, partnership firm, and member of Hindu undivided Family or a Power of Attorney holder. A non-resident Indian can be a Nominee subject to the policy of exchange control for the time being in force.
- (4) Nomination in respect of the units stands rescinded upon the transfer of units.
- (5) Transfer of units in favour of Nominee(s) shall be valid discharge by the Asset Management Company (AMC) against the legal heirs, executors, administrators, etc.
- (6) The cancellation of nomination can be made only by those individuals who hold units in their own name, either solely or jointly and who have originally made the nomination.
- (7) On cancellation of the nomination, the nomination shall stand rescinded & the Asset Management Company (AMC) shall not be under any obligation to transfer the units if favour of the Nominee(s).
- (8) Nomination can be made for maximum number of three nominees. In case of multiple nominees, the percentage of the allocation/share should be in whole numbers without any decimals making a total of 100% (in the event of the unit holders not indicating the percentage of allocation/share for each of the nominees, the AMC, by invoking default option shall settle the claims equally amongst all the nominees).
- (9) Nomination will not be allowed in a folio held on behalf of a Minor. (10) Nomination by a unit holder shall be applicable for investments in all schemes in the folio or account.
- (11) In case a folio has joint holders, ALL Joint holders should sign the request for nomination/cancellation of nomination, even if the mode of holding is not "Joint".
- (12) Every new nomination for a folio/account will overwrite the existing nomination.
- (13) Investors who do not wish to nominate must sign separately confirming their non-intention to nominate.
- (14) Nomination by a unit holder shall be applicable for investments in all schemes in the folio..