







NOMINATION OPTION [MANDATORY DOCUMENT]

Date : <input type="text"/>	UCC: <input type="text"/>	DP ID: IN302349 Client ID <input type="text"/>
SOLE/FIRST HOLDER NAME	SECOND HOLDER NAME	THIRD HOLDER NAME
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
NOMINATION OPTION: (Refer Note 08 For Joint Accounts)		
<input type="checkbox"/> I/ We wish to make a nomination. (Details are provided below in nomination form as prescribed by SEBI)		<input type="checkbox"/> I/ We wish to Opt out of a nomination. (Fill Declaration Form opting out of nomination as prescribed by SEBI)
DECLARATION FOR OPTING OUT OF NOMINATION		
I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our Trading / Demat account and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my / our Trading / Demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the Trading / Demat account.		
[Signature of witness(es) along with name & address are required if the account holder affixes Thumb Impression instead of wet signature]		
	Witness 1	Witness 2
Name	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Address	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Signature	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
 _____ Sole/ First Holder	 _____ Second Holder	 _____ Third Holder

NOMINATION FORM [MANDATORY DOCUMENT]

Date : <input type="text"/>	UCC: <input type="text"/>	DP ID: IN302349 Client ID <input type="text"/>
I / We hereby nominate the following person(s) who shall receive all the assets held in my / our account in the event of my / our demise, as trustee and on behalf of my / our legal heir(s) *		
Nomination Details		
[Mandatory Details]	Details of 1st Nominee	Details of 2nd Nominee
Name of the Nominee(s) (Mr./Ms.)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Share of each Nominee %**	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Relationship with Applicant	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Postal Address of Nominee(s) City/Place State & Country PIN Code	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Mobile No. of Nominee(s)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Email ID of Nominee(s)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Nominee Identity Number [Provide only number, Document not required] <input type="checkbox"/> Aadhaar (only last 4 digits) <input type="checkbox"/> Driving License <input type="checkbox"/> PAN [However, In case of NRI /POI /OCI Passport number is acceptable.] <input type="checkbox"/> Passport Number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

[Additional Details]		Details mentioned below are to be filled only if nominee(s) is a minor***	
Date of Birth [in case of minor nominee(s)]			
Name of Guardian (Mr./Ms)			
Address of Guardian City/Place State & Country PIN Code			
*Joint Accounts:			
Event		Transmission of Account / Folio to	
Demise of one or more joint holder(s)		Surviving holder(s) through name deletion The surviving holder(s) shall inherit the assets as owners	
Demise of all joint holders simultaneously – having nominee		Nominee	
Demise of all joint holders simultaneously – not having nominee		Legal heir(s) of the youngest holder	
** If % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division/fraction of %, shall be transferred to the first nominee mentioned in the Nomination Form (see table in 'Transmission aspects').			
*** to be furnished only if the nominee is minor			
a) Date of Birth of minor, Name & Address of Guardian			
1	I / We want the details of my / our nominee to be printed in the statement of holding or statement of account, provided to me/us by the DP as follows; (please tick, as appropriate) <input type="checkbox"/> Name of nominee(s) <input type="checkbox"/> Nomination: Yes / No		
2	This nomination shall supersede any prior nomination made by me / us, if any.		
3	Signature(s)- As per the mode of holding in demat account(s)		
Name(s) of holder(s)		Signature(s) of holder/thumb impression	
Sole / First Holder (Mr./Ms.)			
Second Holder (Mr./Ms.)			
Third Holder (Mr./Ms.)			
*Signature of witness(es) along with name & address are required if the account holder affixes Thumb Impression instead of wet signature			
	Witness 1 (wherever Applicable)	Witness 2 (wherever Applicable)	
Name			
Address			
Signature			
Rights, Entitlement and Obligation of the investor and nominee:			
a)	If your are opening a new demat account, you have to provide nomination. Otherwise, you have to follow procedure as per 3.10 of the SEBI circular SEBI/HO/OIAE/OIAE_IAD-3/P/ON/2025/01650, dated January 10, 2025.		
b)	You can make nomination or change nominee any number of times without any restriction.		
c)	You are entitled to recive acknowledgement from the DP for each instance of providing or changing nomination.		
d)	The signatories for this nomination form shall be as per mode holding in the demat account. i.e. <ul style="list-style-type: none"> o 'Either or Survivor' Accounts - any one of the holder can sign o 'First Holder' Accounts- only First Holder can Sign o 'Jointly' Accounts - All holders have to sign 		
Transmission aspects			
a)	DPs shall transmit the account to the nominee(s) upon receipt of 1) copy of death certificate and 2) completion / updation of KYC of the nominee(s). The nomimee is not required to provide affidavits, indemnities, undertakings, attestations or notarization.		
b)	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 along with transmission or at a later date. The regulated entity cannot seek KYC documents at the time of transmission, unless it was sought earlier but not provided by the holder.		

c)	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 DP.				
d)	In case of multiple nominees, the assets shall be distributed pro-rata to the surviving nominees, as illustrated below.				
% share as specified by investor at the time of nomination		% assets to be apportioned to surviving nominees upon demise of investor and nominee 'A'			
Nominee	% share	Nominee	% initial share	% of A's share to be apportioned	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%

ACKNOWLEDGEMENT RECEIPT			
Date :	<div style="border: 1px solid black; width: 100%; height: 1.2em; display: flex; flex-wrap: wrap;"> <div style="width: 25%;"></div> <div style="width: 25%;"></div> <div style="width: 25%;"></div> <div style="width: 25%;"></div> </div>	UCC:	<div style="border: 1px solid black; width: 100%; height: 1.2em; display: flex; flex-wrap: wrap;"> <div style="width: 25%;"></div> <div style="width: 25%;"></div> <div style="width: 25%;"></div> <div style="width: 25%;"></div> </div>
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Sole / First Holder Name		Secound Holder Name	Third Holder Name
NOMINATION IN FAVOR OF			
Nominee 1 :			
Nominee 2 :			
Nominee 3 :			
Would like to opt out Nomination <input type="checkbox"/>			
<div style="border-top: 1px solid black; width: 150px; display: inline-block;"></div> DP/ TM Seal & Signature			