

ARN-4464 E032737 VIKRAM S. BAGADTHEY

**FORM FOR NOMINATION / CANCELLATION OF NOMINATION**  
**(For Individual(s)/ Sole Proprietor(s) holding units in Non-Demat Form)**

I/ We \_\_\_\_\_  
(Unit holder 1)

\_\_\_\_\_ and  
(Unit holder 2)

\_\_\_\_\_ (Unit holder 3)

\*do hereby nominate the person(s) more particularly described hereunder/ and\*/ cancel the nomination made by me/ us on the \_\_\_\_\_ day of \_\_\_\_\_ in respect of the Units under Folio No. \_\_\_\_\_ (\* strike out which is not applicable)

Name and Address of Nominee(s)	Date of Birth	Name and Address of Guardian	Signature of Nominee / Guardian of Nominee (Optional)	Proportion (%) in which the units will be shared by each Nominee@
Nominee 1				
Nominee 2				
Nominee 3				

@ The allocation/share should be in whole numbers without any decimals making a total of 100 percent

Name and Address of Unit holder(s)	Signature of Unit holder(s)
Unit holder 1	
Unit holder 2	
Unit holder 3	

Dated:

## Instructions for Nomination

1. Nomination ensures all rights and/or amount(s) payable in respect of the holdings in Schemes of HDFC Mutual Fund would vest in and be transferred to the nominee upon death of the Unit holder. The nominee receives the units only as agent and trustee for the legal heirs or legatees as the case may be. Investors should opt for the nomination facility to avoid hassles and inconveniences in case of unforeseen events in future.
2. Nomination by a unit holder shall be applicable for investments in all schemes in the folio or account.
3. Every new nomination for a folio/account will overwrite the existing nomination. Nomination will be subject to the provisions of the respective Scheme Information Document.
4. Nomination shall be mandatory for new folios/accounts opened by an individual/ Sole Proprietor especially with sole holding and no new folios/accounts for individuals/ Sole Proprietors (with sole holding) would be opened without nomination. However, investors who do not wish to nominate must sign separately confirming their non-intention to nominate. In case nomination/non-intention to nominate is not provided by Individual/ Sole Proprietor (with sole holding) the application is liable to be rejected.
5. The nomination can be made only by individuals/ Sole Proprietors 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. Nomination shall not be allowed in a folio held on behalf of a minor. 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".
6. Minor(s) can be nominated and in that event, the name, address and signature of the guardian of the minor nominee(s) shall be provided by the unitholder. Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.
7. The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, karta of Hindu undivided family or a Power of Attorney holder. A non-resident Indian can be a Nominee subject to the exchange controls in force, from time to time.
8. Nomination in respect of the units stands rescinded upon the transfer of units. Transfer of units in favour of Nominee(s) shall be valid discharge by the AMC against the legal heirs.
9. Cancellation of nomination can be made only by those individuals/ Sole Proprietors who hold units on their own behalf singly or jointly and who made the original nomination.
10. On cancellation of the nomination, the nomination shall stand rescinded and the AMC shall not be under any obligation to transfer the units in favour of the Nominee(s).
11. Nomination can be made for maximum number of three nominees. In case of multiple nominees, the percentage of allocation/share in favour of each of the nominees should be indicated against their name and such allocation/share should be in whole numbers without any decimals making a total of 100 percent.
12. In the event of the Unitholders not indicating the percentage of allocation/share for each of the nominees, HDFC Mutual Fund/ HDFC Asset Management Company Limited (AMC), by invoking default option shall settle the claim equally amongst all the nominees.
13. In case of investors opting to hold the Units in demat form, the nomination details provided by the investor to the depository participant will be applicable.