REQUEST FOR CONSOLIDATION OF FOLIOS

I / We wish to consolidate all my / our investments under specified folios into one folio.

Folios to be consolidated (i.e. source folios):

Target folio* [**MANDATORY**]:

* 1. This folio has to be one of the source folios
   2. The static details like bank account and dividend option of the schemes in this folio will be
        retained after consolidation

Nomination in target folio (**this section should be filled only if there are multiple nominees registered in the source folios**):

	Name of nominee	Proportion (%) by which the units will be shared by each Nominee
Nominee 1		
Nominee 2		
Nominee 3		

Signatures:

_____ _   _____   _____ _
First / sole unit holder   **Second unit holder**   **Third unit holder**

Instructions:
- Folios can be consolidated only if names of the all unit holders (and the pattern of holding), tax status and mode of operation (single / joint / either or survivor) are same in all source folios.
- All joint holders must sign on consolidation requests irrespective of the mode of operation (single / joint / either or survivor) in the source folios.
- Folios once consolidated cannot be separated.
- Folios for units held in demat account cannot be consolidated.
- New nominees should not be added using this form. For registration of new nominees in the target folio, use a nomination request form.
- Consolidation is effected at the folio level and not at the scheme level.