

FORM FOR NOMINATION / CANCELLATION OF NOMINATION

(to be filled by individual(s) applying singly or jointly)



Birla Sun Life
Mutual Fund

ARN-16709 E039709

To,
Birla Sun Life Mutual Fund, One India Bulls Centre, Tower 1, 17th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai - 400 013.

I/We request Birla Sun Life Asset Management Co. Ltd. (AMC) / Birla Sun Life Mutual Fund (Mutual Fund) to update the Nomination in the folio as per details mentioned below.

Folio Number

Application Number

NOMINATION DETAILS (Please tick appropriately) (Individuals are advised to avail of Nomination Facility, whether investing singly or jointly.)

- I/We do hereby nominate the person/s more particularly described hereunder / and cancel the nomination made by me/us earlier, if any, in respect of account (folio) held by me/us as provided herein.
I/We also understand that all payments and settlements made to such Nominee (upon such documentation) shall be a valid discharge by the AMC / Mutual Fund.
- I/We hereby DO NOT wish to nominate. (Please sign in the box below, if you do not wish to nominate)

Name and Address of Nominee

To be furnished in case Nominee is a Minor (strike out if not applicable)

| Name & Address of the Nominee (s) | Nominee's relationship with the unitholder | Date of Birth (in case nominee is minor) | Percentage (%) * of Allocation (*should not be in decimals) | Name & Address of the Guardian (in case nominee is minor) | Signature of Nominee/Guardian (Guardian, in case nominee is a Minor) |
|-----------------------------------|--|--|---|---|--|
| 1. | | | | | ✓ |
| 2. | | | | | |
| 3. | | | | | |

Unit holder (s): (To be signed by all joint holders, even if the mode of holding is not "joint")

Witness (es) - could be the same for all unit holders:

| Name | Signature |
|------|-----------|
| 1. | |
| 2. | |
| 3. | |

| Name & Address | Signature |
|----------------|-----------|
| 1. | ✓ |
| 2. | |
| 3. | |

TERMS & CONDITIONS

- i) Unit holder can nominate (in the manner prescribed under the SEBI Regulations), maximum upto 3 person(s) in whom the Units held by him/her shall vest in the event of his/her death. It shall be mandatory to indicate clearly the percentage of allocation / share in favour of each of the nominees against their name and such allocation / share should be in whole numbers without any decimals making a total of 100 percent. In the event of the Unitholders not indicating the percentage of allocation / share for each of the nominees, the AMCs, by invoking default option shall settle the claim equally amongst all the nominees.
- ii) Nomination made by unitholder shall be applicable for investments in all the Schemes in the folio or account and every new nomination for a folio or account will overwrite the existing nomination. Thus, a new nomination request will imply simultaneous cancellation of existing nomination and request for fresh nomination.
- iii) The nomination can be made only by individuals applying for / holding units on their own behalf singly or jointly in favour of one or more persons. Non-individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided Family, holder of Power of Attorney cannot nominate. Nomination form cannot be signed by Power of attorney (PoA) holders.
- iv) 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".
- v) A minor can be nominated and in that event, the name and address of the guardian of the minor nominee shall be provided by the unit holder. The Applicant is advised that, in case of Single Holding, the Guardian to a Minor Nominee should be a person other than the Applicant.
- vi) Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of these offices or a religious or charitable trust.
- vii) 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.
- viii) Nomination shall not be allowed in a folio/account held on behalf of a minor.
- ix) Nomination in respect of the units stands rescinded upon the transfer of units.
- x) Transfer of units in favour of a Nominee shall be valid discharge by the AMC against the legal heir.
- xi) The cancellation of nomination can be made only by those individuals who hold units on their own behalf single or jointly and who made the original nomination.
- xii) 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.
- xiii) The nomination details as registered with the Depository Participant shall be applicable to unitholders who have opted to hold units in Demat mode.
- xiv) **Nomination shall be mandatory for new folios/accounts opened by individuals especially with sole/single holding and no new folios/accounts for individuals in single holding shall be opened without nomination. However, in case investors do not wish to nominate must sign separately confirming their non-intention to nominate, failing which the form may be rejected at the discretion of the AMC/Mutual Fund.**