



**8 NOMINATION DETAILS**

Registration

Change/Modification

Cancellation

Particulars	Nominee Details		
	Nominee 1	Nominee 2	Nominee 3
Nominee Name			
Address of Nominee			
Relationship with Applicant			
Date of Birth (In case of Minor)			
Name of Guardian (In case of Minor)			
Signature of Guardian/Nominee			
Percentage of Allocation			

\*\*Request for mode of holding change and nominee change should be mandatorily signed by all the holders.

**9 SIGNATURE AND DECLARATION**

"I/We hereby declare and confirm that the information provide in this form is true and correct and is duly supported by the document proof along with the form. I/We further agree and confirm that in the event their is any discrepancy between the information provide herein and the supporting documents, the AMC/Mutual Funds shall be entitled to reject the form. The AMC/Mutual Funds shall not be liable and/or responsible for any loss or damage that I/We may in cure if the Forms is rejected."

 First Applicant/Guardian	 Second Applicant	 Third Applicant
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**INSTRUCTIONS**

**Nomination:**

- The nomination can be made only by individuals applying for / holding units on their own behalf, singly or jointly. If the units are held jointly, all joint holders will sign the nomination form irrespective whether mode of holding is Either or Survivor.
- Non-individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided Family (HUF), holder of Power of Attorney cannot nominate. Similarly, nomination cannot be registered in folio's held in the name of the minor/s.
- 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.
- Nomination can be done 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.
- A Non-Resident Indian (NRI) can be a Nominee subject to the exchange controls in force, from time to time.
- Nomination in respect of the units stands rescinded upon (a) transfer of units and (ii) in the event where the death of the nominee precedes the death of the unit holder.
- Transfer of units in favour of a Nominee shall be valid discharge by the asset management company against the legal heirs.
- The cancellation of nomination can be made only by those individuals who hold units on their own behalf, singly or jointly and who made the original nomination.
- On cancellation of the nomination, the nomination shall stand rescinded and the asset management company shall not be under any obligation to transfer the units in favour of the Nominee.
- 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 holder(s) 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.
- If the mode of holding is single and the existing nomination (s) is cancelled without any further nomination, it shall be construed as a deemed consent of that investor for not having any nominee in the existing folio.
- Nomination by a unitholder shall be applicable for investments in all schemes in the folio or account.
- 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.
- 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.
- In order to receive the amount standing to the credit of the account, in the event of the death of the unitholder, the nominee (s) shall be obliged to furnish such documents as may be required by IDFC AMC Ltd., to its satisfaction.

**Change of Bank Mandate:**

- Any one of the below mentioned documents has to be submitted as proof for both old and new bank mandate.

Old Bank Proof Documents	New Bank Proof Documents
Original Cancelled Cheque bearing account number and first unit holder name on the face of the cheque.	Original Cancelled Cheque bearing account number and first unit holder name on the face of the cheque.
Original bank account statement / Certified copy of the bank account statement.	Self-attested copy of bank account statement not older than 3 months.
Certified copy of the Bank passbook duly attested by branch manager/authorized personnel with his/her full signature, name, designation, employee code, and bank seal.	Self-attested copy of Bank passbook with current entries not older than 3 months.
Original Account closure confirmation letter given by the bank on their letter head.	Bank confirmation letter duly signed by branch manager/authorized personnel with his/her full signature, name, designation, employee code, and bank seal.
Bank Letter (in specified format) confirming bank account details, duly signed by branch manager/ authorized personnel with his/her full signature, name, designation, employee code, and bank seal.	-

- The name printed on the cancelled cheque/bank passbook/bank account statement/bank's letterhead should be same as per the folio.
- In case, photocopies of the above stated documents are submitted without attestation, investor must produce original for verification to the AMC branch or official point of acceptance of transactions.
- In absence of old bank account proof, the unitholder shall visit the nearest AMC / CAMS branch office for In-Person Verification with above documents and Identity proof.
- IDFC AMC / Fund may call for any additional documents if required.
- The new bank account mentioned in this form will be registered as the default account.

**Consolidation of Folios:**

- Folios can be consolidated only if names of the all unit holders (and the pattern of holding), tax status, nomination and mode of operation (single/joint/ either or survivor) are same in all source folios.
- Details like the mode of holding, bank mandate, address, nomination etc. in the target Folio will be applicable and will prevail after consolidation even if they were different details in source folio.
- 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.
- Consolidation is effected at the folio level and not at the scheme level.

**Alterations in the form, if, any, should be countersigned.**

**Toll free 1800 266 6688 / 1800 300 66688**  
Available Between  
8:00 am - 8:00 pm on weekdays

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