

## Creation of Household View and Joint Investment Portfolio

Branch \_\_\_\_\_

Date \_\_\_\_\_

### Household View

We wish to create a household view for the below mentioned persons -

| No. | Name | Customer Id * | Primary Member<br>(tick any one) |
|-----|------|---------------|----------------------------------|
| 1   |      |               |                                  |
| 2   |      |               |                                  |
| 3   |      |               |                                  |

- We understand that the primary member of the household would be able to view overall relationship (including all investments, bank account balances, loan balances, insurance) held either singly or jointly by any / all the members mentioned above
- We understand that the primary member also would be able to do portfolio analysis, track performance on all investments and generate reports on overall relationship held by the members mentioned above

### Joint Investment Portfolio (named 'db Online – Joint')

We wish to create the following Joint Investment Portfolio for the purpose of placing order for mutual fund units online

#### Joint Investment Portfolio 1

| No. | Name | Customer Id * | Combination        |
|-----|------|---------------|--------------------|
| 1   |      |               | Primary Member     |
| 2   |      |               | Secondary Member 1 |
| 3   |      |               | Secondary Member 2 |

Nomination –We hereby nominate the following person in respect of all the scheme(s) purchased under the above joint portfolio

|                         |   |
|-------------------------|---|
| Nominee Name:           | If Nominee is minor:<br>Date of Birth: _____<br>Name of Guardian: _____<br>Address: _____ |
| Relation with Investor: |   |
| Address:                |   |
|                         |   |

#### Joint Investment Portfolio 2

| No. | Name | Customer Id * | Combination        |
|-----|------|---------------|--------------------|
| 1   |      |               | Primary Member     |
| 2   |      |               | Secondary Member 1 |
| 3   |      |               | Secondary Member 2 |

Nomination –We hereby nominate the following person in respect of all the scheme(s) purchased under the above joint portfolio

|                         |   |
|-------------------------|---|
| Nominee Name:           | If Nominee is minor:<br>Date of Birth: _____<br>Name of Guardian: _____<br>Address: _____ |
| Relation with Investor: |   |
| Address:                |   |
|                         |   |

We understand that the above investment portfolio(s) is / are created in Either / Any or Survivor. Also holding of mutual fund units under the specified portfolio would be only in the combination mentioned above irrespective of the order in which we place the instructions for buying the mutual fund units.

(\* All customers whose customer ID is mentioned above for creating a Household view and / or a Joint Investment portfolio need to sign below)

**Customer Name(s)**

**Signature(s)**