



## Nomination for Multiple holders and Household View Form

### Nomination for Multiple Holders

| Sr. No. | Customer ID | Customer Name | Combination        |
|---------|-------------|---------------|--------------------|
|         |             |               | Primary Member     |
|         |             |               | Secondary Member 1 |
|         |             |               | Secondary Member 2 |

We hereby wish to create the following Investment Portfolio for the purpose of placing orders for mutual fund units online and also nominate the following person(s) in respect of all the scheme(s) purchased under the Investment Portfolio.

We also understand that the investment portfolio is 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.

Investment Portfolio Name Desired: \_\_\_\_\_

#### Nominee 1

|   |   |
|---|---|
| Nominee Name:                           |   |
| Relation with Investor:                 |   |
| % Ownership:                            |   |
| Nominee Address:                        |   |
| Nominee Date of Birth: (DD/MM/YYYY)     | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Nominee Minor: (Please Tick)            | <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| Guardian Name: (If Nominee is Minor)    |   |
| Guardian Address: (If Nominee is Minor) |   |

#### Nominee 2

|   |   |
|---|---|
| Nominee Name:                           |   |
| Relation with Investor:                 |   |
| % Ownership:                            |   |
| Nominee Address:                        |   |
| Nominee Date of Birth: (DD/MM/YYYY)     | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Nominee Minor: (Please Tick)            | <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| Guardian Name: (If Nominee is Minor)    |   |
| Guardian Address: (If Nominee is Minor) |   |

|   |   |
|---|---|
| <b>Nominee 3</b>                        |   |
| Nominee Name:                           |   |
| Relation with Investor:                 |   |
| % Ownership:                            |   |
| Nominee Address:                        |   |
| Nominee Date of Birth: (DD/MM/YYYY)     | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Nominee Minor: (Please Tick)            | <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| Guardian Name: (If Nominee is Minor)    |   |
| Guardian Address: (If Nominee is Minor) |   |

### Household View

| Sr. No. | Customer ID | Customer Name | Primary Member<br>(Please 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 of the members mentioned above.

We also understand that the primary member would also be able to do a portfolio analysis, track performance on all investments and generate reports on overall relationship held by the members mentioned above.

All customers whose Customer ID(s) have been mentioned in the pages above need to sign below:

| Sr. No. | Customer Name(s) | Signature(s) |
|---------|------------------|--------------|
| 1       |                  |              |
| 2       |                  |              |
| 3       |                  |              |

Date:

Branch: \_\_\_\_\_