



Expertise that's trusted

TATA MUTUAL FUND
 Mafatlal Centre 9th Floor Nariman Point Mumbai - 400 021
Form for Nomination / Cancellation of Nomination
 (to be filled in by individual(s) applying singly or jointly)



Date: / /

I/We and
 and * do hereby nominate the person(s) more particularly described hereunder
 / and# / cancel the nomination(s) made by me / us on the day of in respect of the units held
 under Folio bearing No. (* strike out which is not applicable). I / We do hereby nominate the under mentioned
 nominee to receive the Units allotted to me / our credit in my folio in the event of my / our death. I / We understand that all payments and settlements made
 to such Nominee and Signature of the Nominee acknowledging receipt thereof, shall be a valid discharge of the AMC / Mutual Fund / Trustees.

1. First Nominee Name*

Nominee's relationship with 1st holder		Date of Birth <input type="text"/>	Proof of DOB (in case of minor) <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others
Address			
			City
State	PIN	Country	
Name of the Guardian (in case Nominee is a minor)			
Address of the Guardian			
			City
State	PIN	Country	
Guardian's Relationship with the Nominee <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian		Proof of relationship: <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others	
% of Allocation / Share in favour of Nominee*		Signature of Nominee / Guardian*	

2. Second Nominee Name*

Nominee's relationship with 1st holder		Date of Birth <input type="text"/>	Proof of DOB (in case of minor) <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others
Address			
			City
State	PIN	Country	
Name of the Guardian (in case Nominee is a minor)			
Address of the Guardian			
			City
State	PIN	Country	
Guardian's Relationship with the Nominee <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian		Proof of relationship: <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others	
% of Allocation / Share in favour of Nominee*		Signature of Nominee / Guardian*	

X	1 st Applicant Signature / Thumb Impression	X	2 nd Applicant Signature / Thumb Impression	X	3 rd Applicant Signature / Thumb Impression
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3. Third Nominee Name*		
Nominee's relationship with 1st holder	Date of Birth D D / M M / Y Y Y Y	Proof of DOB (in case of minor) <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others
Address		
		City
State	PIN	Country
Name of the Guardian (in case Nominee is a minor)		
Address of the Guardian		
		City
State	PIN	Country
Guardian's Relationship with the Nominee <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian		Proof of relationship: <input type="checkbox"/> Birth Certificate <input type="checkbox"/> School Leaving Certificate <input type="checkbox"/> Passport <input type="checkbox"/> Others
% of Allocation / Share in favour of Nominee*		Signature of Nominee / Guardian*
X 1 st Applicant Signature / Thumb Impression	X 2 nd Applicant Signature / Thumb Impression	X 3 rd Applicant Signature / Thumb Impression

*Mandatory

ALL Joint holders should sign the request for nomination/cancellation of nomination on both the pages.

Instructions for Nomination / Cancellation of Nomination

As per SEBI regulations, you can assign a nominee to the investments, to whom the amounts will be payable on death of the some or all Unit holders as the case may be. It is mandatory to fill this section and sign in the specified place; even if you do not wish to nominate anybody it is mandatory for you to select the option for the same. If you wish to appoint multiple nominees please fill up the Application Form for Multiple Nominations and submit it along with this form.

1. The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly. Non-Individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided Family, holder of Power of Attorney cannot nominate. If the units are held jointly, all joint holders will sign the nomination form.
2. Minor(s) can be nominated & in that event, the name, address & signature of the guardian of the minor nominee(s) shall be provided by the unit holder.
3. The nominee shall not be a trust (other than religious and charitable trust), society, body corporate, partnership firm, and member of Hindu undivided Family or a Power of Attorney holder. A non-resident Indian can be a Nominee subject to the policy of exchange control for the time being in force.
4. Nomination in respect of the units stands rescinded upon the transfer of units.
5. Transfer of units in favour of Nominee(s) shall be valid discharge by the Asset Management Company (AMC) against the legal heirs, executors, administrators, etc.
6. The cancellation of nomination can be made only by those individuals who hold units in their own name, either solely or jointly and who have originally made the nomination.
7. On cancellation of the nomination, the nomination shall stand rescinded & the Asset Management Company (AMC) shall not be under any obligation to transfer the units if favour of the Nominee(s).
8. 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 holders 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).
9. Nomination will not be allowed in a folio held on behalf of a Minor. (10) Nomination by a unit holder shall be applicable for investments in all schemes in the folio or account.
11. 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" on both the pages.
12. Every new nomination for a folio/account will overwrite the existing nomination.
13. Investors who do not wish to nominate must sign separately confirming their non-intention to nominate.
14. Nomination by a unit holder shall be applicable for investments in all schemes in the folio.