Format for providing Nomination for Demat Account and MF Folios

AngelOne Mutual Fund

Mandatory for MF Folios with Single Holding only (effective from September 01, 2026)
Please read the instructions carefully before filling up this form

Name of the Mutual Fund	
Folio No(s)	
Investor Name	

I/We wish to make a nomination. *[As per details given below]*

Nomination Details

☐ I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my / our folio / account in the event of my / our death. This nomination shall supersede any prior nomination made by us/me if any.

1. Mandatory Details

	Details	1st Nominee	2nd Nominee	3rd Nominee
1.	Name of the nominee			
2.	Relationship with the Applicant	☐ Father ☐ Mother ☐ Spouse ☐ Son ☐ Daughter ☐ Others (Please specify)	☐ Father ☐ Mother ☐ Spouse ☐ Son ☐ Daughter ☐ Others (Please specify)	☐ Father ☐ Mother ☐ Spouse ☐ Son ☐ Daughter ☐ Others (Please specify)
3.	Date of Birth (to be provided in case of nominee is minor)	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y

2. I want the following nomination details to be printed in the account / holding statements (tick one of the boxes below):

☐ Name of the Nominee(s)

☐ Whether nomination given: Yes / No (not name of the nominee)

3. A. Optional details of nomination:

S.No.	Details	1st Nominee	2nd Nominee	3rd Nominee
a)	% Share of each Nominee ** *(equal share if % is not specified)*	☐ 100% ☐ 75% ☐ 50% ☐ 33⅓% ☐ 25% ☐ Others (Please specify)	☐ 100% ☐ 75% ☐ 50% ☐ 33⅓% ☐ 25% ☐ Others (Please specify)	☐ 100% ☐ 75% ☐ 50% ☐ 33⅓% ☐ 25% ☐ Others (Please specify)
		Any odd lot after division shall be transferred to the first nominee mentioned in the form.		
b)	Mobile of nominee*** *(Please note that the DP / MF RTA will be able to reach out to your nominee if you provide the contact details)*			
c)	Email ID of nominee*** *(Please note that the DP / MF RTA will be able to reach out to your nominee if you provide the contact details)*			
d)	Specify Personal identifier document • Aadhaar (last four digit), PAN, Driving Licence, Passport ***			
e)	Guardian Name *(applicable if the Nominee is minor)*			

**Any odd lot after division shall be transferred to the first nominee mentioned in the form.
*** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.

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ACKNOWLEDGMENT SLIP (To be filled in by the investor)

Request for ☐ Registration ☐ Modification ☐ Cancellation of Nominees ☐ Opt out of Nomination

Folio No. ____________ Date: D D M M Y Y Y Y

Name ____________

PAN ____________

Signature, Stamp & Date

This nomination shall supersede any prior nomination made by the account holder(s), if any

4. Signature:

Name(s) of holder(s)	Signature(s) of holder****
Sole / First Holder (Mr./Ms.)	
Second Holder (Mr./Ms.)	
Third Holder (Mr./Ms.)	

****If nomination is submitted:
- **Online:** *validate through Digital Signature Certificate or Aadhaar-based e-sign or by using any other e-sign facility recognized under Information Technology Act, 2000 or two factor authentication (2FA) in which one of the factors shall be a One-Time Password sent to the registered mobile number and email address.*
- **Physical / offline:** *wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses shall be duly provided in this form.*

Name(s) of holder(s)	Thumb Impression	Witness Name & Address	Witness Signature
Sole / First Holder (Mr./Ms.)			
Second Holder (Mr./Ms.)			
Third Holder (Mr./Ms.)			

Note:
- Investors can provide changes or cancel nominations any number of times.
- The signature of all the joint holders shall be obtained for providing / changing nomination.
- This nomination shall supersede any prior nomination made by the investor(s), if any.
- Investors can change nomination any number of times.
- Investors have the right to receive acknowledgement of the nomination form for each instance of nomination / subsequent change.

Additional points to be noted.
- Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder cannot nominate.
- Nomination is not allowed in a folio where Minor is the unitholder.
- A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee is to be provided optionally.
- Nomination can also be 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.
- 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 may be nominated subject to the applicable exchange control regulations.
- Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
- Nomination shall stand rescinded upon the transfer of units.
- Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).
- The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
- In respect of folios/accounts where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.
- Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single account / folio.
- Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC / DP.

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☐ I hereby confirm that I do not wish to appoint any nominee(s) to my demat account/ mutual fund folio at this point of time. I understand that – (i) the nomination helps to quickly identify the person for transfer of securities and helps in faster and smoother transmission of my securities to my legal heir(s) after my demise. (ii) in the absence of a nomination, my legal heir(s) may require the submission of certain additional legal or court-issued documents which may delay the process of transmission of securities to my legal heir(s). (iii) if no claim is made on the account / folio for a prolonged period after my demise, the holdings may be treated as unclaimed assets and they may be transferred to Investor Education and protection Fund Authority (IEPF) in accordance with the applicable regulatory framework. ☐ I confirm that I have understood the above implications and that my decision to opt out of nomination is voluntary..			
Name of Holder(s)			
Signature of Holder(s)			

** Signature of witness, along with name and address are required, if the account holder affixes thumb impression instead of signature.*

Instructions

1. The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
2. Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder cannot nominate.
3. Nomination is not allowed in a folio of a Minor unitholder.
4. If the units are held jointly (i.e., in case of multiple unitholders in the folio), all joint holders need to sign the Nomination Form (even if the mode of holding/operation is on “Anyone or Survivor” basis).
5. A minor may be nominated. In that event, all mandatory details of the Guardian of the minor nominee needs to be provided.
6. Nomination can also be 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.
7. 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.
8. A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
9. **Multiple Nominees:** Nomination can be made in favour of multiple nominees, subject to a maximum of three nominees currently. In case of multiple nominees, the percentage of the allocation/share should be in whole numbers without any decimals, adding upto a total of 100%. If the total percentage of allocation amongst multiple nominees does not add up to 100%, the nomination request shall be treated as invalid and rejected. If the percentage of allocation/ share for each of the nominee is not mentioned, the allocation /claim settlement shall be made equally amongst all the nominees.
10. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
11. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
12. Nomination shall stand rescinded upon the transfer of units.
13. **Death of Nominee/s:** In the event of the nominee(s) pre-deceasing the unitholder(s), the unitholder/s is/are advised to make a fresh nomination soon after the demise of the nominee. The nomination will automatically stand cancelled in the event of the nominee(s) pre-deceasing the unitholder(s). In case of multiple nominations, if any of the nominee is deceased at the time of death claim settlement, the said nominee’s share will be distributed equally amongst the surviving nominees.
14. **Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).**
15. **Cancellation of Nomination:** Request for cancellation of Nomination can be made only by the unitholders. The nomination shall stand rescinded on cancellation of the nomination and the AMC shall not be under any obligation to transfer / transmit the units in favour of the Nominee.
16. Unit holders who do not wish to nominate are required to confirm the same by indicating their choice in the space provided in the nomination form.
17. The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
18. In respect of folios/accounts where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.