

Date: \_\_/\_\_/\_\_\_\_

Customer Relationship Number (CRN)***	
Investment Account Number***	
Sole / First Holder Name	
Second Holder Name	
Third Holder Name	

\*\*\* Mandatory

## Form for Fresh Nomination

(Mandatory &amp; only to be filled if not opting out of nomination)

Applicable for Resident Individuals, Non-Resident and Sole Proprietor Unitholders only - whether holding Units Singly or Jointly with other holders. Please read the instructions carefully before filling up this form.

I/We, the above-named holders do hereby:

- ☐ Nominate the person more particularly described hereunder to receive the Units held in all my/our new mutual fund Folio/s created from the above date onwards with Kotak Mahindra Bank Ltd. (ARN-1390) in the event of my/our death.

Name of the Nominee		
PAN of the Nominee**	Date of Birth of Nominee* D D / M M / Y Y Y Y	
Nominee Relationship		
Name of the Guardian*	PAN of Nominee Guardian*	
Guardian's Relationship with 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		
Address		
City	State	PIN

\*Mandatory. Applicable in case the Nominee is a Minor. Also, please attach a copy of the minor's birth certificate.

\*\*Applicable in case the Nominee is a Major.

I/We hereby declare and confirm that I/We shall retain the same nominee details as provided above in all my/our new mutual fund folio/s created through Kotak Mahindra Bank Ltd. (ARN- 1390). I/We also declare and confirm that in case I/We wish to make any changes in my/our nominee details in future, I/We shall make specific requests to Kotak Mahindra Bank Ltd. for the purpose, in the prescribed format.

Sole / First Holder Signature	Second Holder Signature	Third Holder Signature
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## Declaration Form for Opting Out of Nomination

(Mandatory &amp; only to be filled if not declaring nomination)

- ☐ I/We hereby confirm that I/We do not wish to appoint any nominee for my/our new mutual fund Folio/s created through Kotak Mahindra Bank (ARN-1390) from the above-mentioned onwards. I/We understand the issues involved in non-appointment of nominee and further are aware that in case of death of all the account holder(s), my/our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

I/We hereby declare and agree to opt out from declaring any nominee in any new mutual fund Folio/s created through Kotak Mahindra Bank (ARN – 1390). I/We also declare and confirm that in case I/We wish to make any changes in my/our nominee details in future, I/We shall make specific requests to Kotak Mahindra Bank Ltd. for the purpose, in the prescribed format.

Sole / First Holder Signature	Second Holder Signature	Third Holder Signature
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