

UNITHOLDER INFORMATION
Folio No/s.

Name of 1st Holder

Name of 2nd Holder

Name of 3rd Holder

I/ We, the above named investors of Kotak Mahindra Mutual Fund, do hereby nominate the person(s) hereunder to receive the Units held by my/ our Folio/s listed above in the event of my/ our death as trustee and on behalf of my/ our legal heir(s).

NOMINATION DETAILS (MANDATORY)

Name of 1st Nominee:

% of Allocation**:

Relationship with Applicant: ☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify)

Postal Address:

Email Address:

Mobile Number:

Identity Document:

☐ PAN

☐ Driving License

☐ Aadhaar

☐ Passport
(NRI/ PIO/ OCI only)

Identity No.:

(if Aadhaar, last 4 digits only)

Nominee Date of Birth (Mandatory only if Nominee is a Minor):

Guardian's Name:

Name of 2nd Nominee:

% of Allocation**:

Relationship with Applicant: ☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify)

Postal Address:

Email Address:

Mobile Number:

Identity Document:

☐ PAN

☐ Driving License

☐ Aadhaar

☐ Passport
(NRI/ PIO/ OCI only)

Identity No.:

(if Aadhaar, last 4 digits only)

Nominee Date of Birth (Mandatory only if Nominee is a Minor):

Guardian's Name:

Name of 3rd Nominee:

% of Allocation**:

Relationship with Applicant: ☐ Spouse ☐ Father ☐ Mother ☐ Daughter ☐ Son ☐ Others (please specify)

Postal Address:

Email Address:

Mobile Number:

Identity Document:

☐ PAN

☐ Driving License

☐ Aadhaar

☐ Passport
(NRI/ PIO/ OCI only)

Identity No.:

(if Aadhaar, last 4 digits only)

Nominee Date of Birth (Mandatory only if Nominee is a Minor):

Guardian's Name:

** if % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division/ fraction of %, shall be transferred to the first nominee mentioned in the nomination form.

NOMINEE DETAILS TO BE PRINTED IN STATEMENT OF HOLDING (MANDATORY - TICK ANY ONE)

I/ We want the details of me/ our nominee to be printed in the statement of holding or statement of account, provided to me/ us by the AMC as follows: (please tick, as appropriate)

☐ Nomination: Yes/ No

☐ Name of Nominee(s) with Percentage

If no option is selected, the account statement will by default display the Nomination status as 'Nomination: Yes/ No' without revealing Nominee name(s)

UNIT HOLDER(S) SIGNATURE(S) & DECLARATION

I/ We have read and understood the instructions on nomination given below/ overleaf and I/ We hereby undertake to abide by the same. The instructions contained herein supercedes all previous nominations made by me/ us in respect of the folio(s) mentioned above.

Name(s) of Holder(s)	Signature(s) of holder/ thumb impression	Signatures of two witnesses*	Name of Witness & Address (wherever applicable)*
Sole/ First Holder			
Second Holder			
Third Holder			

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