

# FORM FOR FRESH NOMINATION / CHANGE OF EXISTING NOMINATION/ CANCELLATION OF NOMINATION



Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders  
Please read the instructions carefully before filling up this form

Name of 1st Holder	
Name of 2nd Holder	
Name of 3rd Holder	

I/We, the above named Unitholders of Union Mutual Fund, do hereby

- Nominate the person(s) more particularly described hereunder to receive the Units held in my/our Folio/s listed below in the event of my / our death. I/We also understand that all payments and settlements made to such Nominee(s) shall be a valid discharge by the AMC / Mutual Fund / Trustee/ Sponsor; and/or
- Cancel/Opt out of the nomination(s) made by me / us previously in respect of the units held by me/ us in the Folio/s listed below. I / We hereby also confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non- appointment of nominee(s) 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.

(tick whichever is applicable).

Folio No.	Folio No.	Folio No.	Folio No.

Name of the 1st Nominee				% of Allocation	
Relationship with Nominee			Date of Birth of Nominee*	D	D
PAN of the Nominee	PAN of the Guardian*				
Name of the Guardian*				Signature of the Guardian (Optional)	
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 Code	

Name of the 1st Nominee				% of Allocation	
Relationship with Nominee			Date of Birth of Nominee*	D	D
PAN of the Nominee	PAN of the Guardian*				
Name of the Guardian*				Signature of the Guardian (Optional)	
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 Code	

Name of the 1st Nominee				% of Allocation	
Relationship with Nominee			Date of Birth of Nominee*	D	D
PAN of the Nominee	PAN of the Guardian*				
Name of the Guardian*				Signature of the Guardian (Optional)	
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 Code	

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

Signature of the 1st unitholder
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Signature of the 2nd unitholder
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Signature of the 3rd unitholder
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## ACKNOWLEDGEMENT SLIP (To be filled in by the investor)

Folio No./ Application No.	
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Date	D	D	M	M	Y	Y	Y	Y
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Received from: Mr./ Ms. /M/s \_\_\_\_\_ Nomination Form.

Collection centre's stamp with date and time of receipt



## INSTRUCTIONS

1. Please read the Scheme Information Document (SID), Statement of Additional Information (SAI) and Key Information Memorandum (KIM) and relevant addenda thereto, if any, carefully for the terms and conditions pertaining to nomination. All applicants are deemed to have read, understood and accepted the terms pertaining to nomination and bind themselves to the terms upon signing this form.
2. The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
3. 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.
4. Nomination is not allowed in a folio of a Minor unitholder.
5. 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).
6. A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee needs to be provided.
7. 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.
8. 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.
9. A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
10. **Multiple Nominees:** Nomination can be made in favour of multiple nominees, subject to a maximum of three nominees. 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.
11. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
12. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
13. Nomination shall stand rescinded upon the transfer of units.
14. **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.
15. **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).**
16. **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.
17. Unitholders who do not wish to nominate are required to confirm the same by indicating their choice in the space provided in the nomination form.
18. The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
19. 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.

### STAY CONNECTED WITH US

Give a missed call from your registered mobile number on **08010421326** and get an Account Statement via SMS.

 <b>Call Centre</b> Telephone: 022 67483333 Toll Free number: 1800 200 2268 / 1800 572 2268	 <b>Email ID</b> investorcare@unionmf.com	 <b>Online Chatbot</b>
	 <b>Website</b> www.unionmf.com	 <b>WhatsApp</b> 93214 03687

Please address all future communication(s) in connection with this application to the Registrar & Transfer Agent of the Scheme:

**Computer Age Management Services Ltd.,**

Unit: Union Mutual Fund

158, Rayala Tower 1, 1st Floor, Anna Salai, Chennai - 600002.

**Email:** enq\_uk@camsonline.com | **Website:** www.camsonline.com

**Union Asset Management Company Pvt. Ltd.**

Unit 503, 5th Floor, Leela Business Park, Andheri Kurla Road,  
Andheri (East), Mumbai - 400059.

**Toll Free :** 1800 200 2268/1800 572 2268 | **Tel No. :** 022 67483333

**Website:** www.unionmf.com | **Email :** investorcare@unionmf.com

