

Nomination Form

Investeria Financial Services Pvt Ltd




Registered Office: 1003 Ruby Crescent, Ashok Chakrawarthy Road, Kandivali – East, Mumbai – 400101, India.




KYC / Correspondence Office: 918, Iconic Shyamal, Shyamal Cross Road, Ahmedabad – 380015, Gujarat.

Dear Sir/ Madam,

I/We the sole holder / Joint holders / Guardian (in case of minor) hereby declare that:

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) who shall receive all the assets held in my / our account in the event of my / our death.				
Nomination can be made upto three nominees in the account.		Details of 1st Nominee	Details of 2nd Nominee	Details of 3rd Nominee
Mandatory Details				
1	Name of the nominee(s) (Mr./Ms.)*			
2	Share of each Nominee	Equally <small>[If not equally, please specify percentage]</small>	%	%
Any odd lot after division shall be transferred to the first nominee mentioned in the form.				
3	Relationship With the Applicant (If Any)			
* Date of Birth and Name of Guardian to be provided in case of minor nominee(s)				
Non-mandatory Details				
4	Address of Nominee(s)/ Guardian in case of Minor City / Place: State & Country: PIN Code			
5	Mobile / Telephone No. of nominee(s)/ Guardian in case of Minor			
6	Email ID of nominee(s)/ Guardian in case of Minor			
7	Nominee/ Guardian (in case of Minor) Identification details – [Please tick any one of following and provide details of same] <input type="checkbox"/> Photograph & Signature <input type="checkbox"/> PAN <input type="checkbox"/> Aadhaar <input type="checkbox"/> Saving Bank account no. <input type="checkbox"/> Proof of Identity <input type="checkbox"/> Demat Account ID			

 [8/23] First Holder / Sole Holder	 [5/14] Second Holder	 [5/14] Third Holder
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Name(s) of holder(s)		Signature(s) of holder*
Sole / First Holder (Mr./Ms.)		 [9/23]
Second Holder (Mr./Ms.)		 [6/14]
Third Holder (Mr./Ms.)		 [6/14]


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

Note:

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

The Intermediary shall provide acknowledgement of the nomination form to the account holder(s)

Details of the Witness

First Witness		
Name of the witness		Address of Witness
Signature of Witness		

Declaration for opting-out of nomination




To

Investeria Financial Services Pvt Ltd

Registered Office: 1003 Ruby Crescent, Ashok Chakrawarthy Road, Kandivali – East, Mumbai – 400101, India.


I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our MF Folio/demat account 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 / information for claiming of assets held in my / our MF Folio / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio / demat account.

Name and Signature of Holder(s)*

1.  [10/23] 2.  [7/14] 3.  [7/14]

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

Details of the Witness

First Witness		
Name of the witness		Address of Witness
Signature of Witness		

FOR OFFICE USE ONLY

UCC Code allotted to the Client : _____

	Documents verified with Originals	Client Interviewed By	In-Person Verification done by
Name of the Employee			
Employee Code			
Designation of the employee			
Date			
Signature			

I / We undertake that we have made the client aware of 'Policy and Procedures', tariff sheet and all the non-mandatory documents. I/We have also made the client aware of 'Rights and Obligations' document (s), RDD and Guidance Note. I/We have given/sent him a copy of all the KYC documents. I/We undertake that any change in the 'Policy and Procedures', tariff sheet and all the non-mandatory documents would be duly intimated to the clients. I/We also undertake that any change in the 'Rights and Obligations' and RDD would be made available on my/our website, if any, for the information of the clients.

For, Investeria Financial Services Pvt Ltd

Signature of the Authorised Signatory

Date: _____



Stamp of the intermediary