



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

Date: 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name of the Mutual Fund	<b>FRANKLIN TEMPLETON MUTUAL FUND</b>
Folio No(s).	
Name of 1 <sup>st</sup> Holder	
Name of 2 <sup>nd</sup> Holder	
Name of 3 <sup>rd</sup> Holder	

I/We, the above-named unitholders in the referred Mutual Fund, do hereby nominate the person(s) more particularly described hereunder to receive the units held my/our folio(s) listed below in the event of my / our death and by cancelling the nomination(s) made by me / us previously in respect of the units held by me/ us in the indicated folio(s).

Name and address of Nominee(s) [Mandatory]	PAN of the Nominee [Guardian PAN to be quoted if Nominee is Minor]	Relationship with Sole / First unit holder [Mandatory]	Date of Birth*	Name and address of Guardian*	Signature of Nominee / Guardian [Optional]	Guardian's Relationship with Nominee*	Allocation % to each nominee [Mandatory] (Aggregate should be 100%)
			DDMMYYYY			<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	
			DDMMYYYY			<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	
			DDMMYYYY			<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Legal Guardian	

\* Applicable in case the Nominee is a Minor. (Also, please attach a copy of the minor's birth certificate or School Leaving Certificate or Passport or Others equivalent proof)

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

**Declaration & Signature(s)** [to be signed by all unit holders including joint holders, irrespective of mode of holding]

I / We have read the terms and conditions for nomination and hereby nominate the above nominee(s) to receive all the amounts to my / our credits in the event of my / our death. Signature of the nominee(s) acknowledging receipt of my / our credit will constitute full discharge of liabilities of the indicated Mutual Fund.

**OR**

I/We DO NOT wish to nominate: I / We do hereby 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 holders, my / our legal heirs would need to submit all the requisite documents issued by court or such other competent authority, based on the value of the assets held in the mutual fund folio.

Signature of the 1<sup>st</sup> unitholder

Signature of the 2<sup>nd</sup> unitholder

Signature of the 3<sup>rd</sup> unitholder

## **TERMS AND CONDITIONS**

1. The nomination can be made only by individuals applying for / holding units on their own behalf singly or jointly.
2. All unit holders should sign the Nomination Form irrespective of mode of holding.
3. Non-individuals including society, trust, body corporate, partnership firm, Karta of Hindu Undivided family, holder of Power of Attorney, Guardian on behalf of Minors cannot nominate.
4. Minor(s) can be nominated and in that event, the name, address, and signature of the guardian of the minor nominee shall be provided by the unit holder.
5. 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.
6. The Nominee shall not be a trust [other than a religious or charitable trust], society, body corporate, and partnership firm, Karta of Hindu Undivided Family, or a Power of Attorney holder.
7. A non-resident Indian can be a nominee subject to the exchange controls in force, from time to time.
8. Nomination in respect of the units stands rescinded upon the transfer of units. The rights in the units will vest on the nominee only upon the death of all unit holders.
9. Nomination can be made for maximum number of three nominees.
10. Transfer of units in favour of Nominee(s) shall be valid discharge by the Asset Management Company against the legal heir.
11. The cancellation of nomination can be made only by those individuals who hold units on their behalf singly or jointly and who made the original nomination.
12. On cancellation of the nomination, the nomination shall stand rescinded, and the asset management company shall not be under any obligation to transfer the units in favour of the Nominee(s).
13. 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.
14. If the aggregate is less than 100% than the balance will be re-balanced to the first nominee. If the aggregate is greater than 100% then nomination would be rejected.
15. In the event of the unit holders not indicating the percentage of allocation/share for each of the nominees, Mutual Fund / Asset Management Company, by invoking default option shall settle the claim equally amongst all the nominees, at their own discretion.
16. Every new nomination for a folio/account will overwrite the existing nomination, i.e., simultaneous cancellation of existing nomination and updation of new nominee(s) as per the new request.