

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

☐ Fresh Nomination ☐ Change of Existing Nomination ☐ Cancellation of Nomination

Date :

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

Folio No.(s)	
1.	2.
3.	4.

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.	Mandatory Details		
	1st Nominee	2nd Nominee	3rd Nominee
Name of the Nominee (Mr./Ms.)*			
Share of each Nominee (%) Equally [If not equally, please specify percentage]	%	%	%
Relationship with the Applicant (if any)	<i>Any odd lot after division shall be transferred to the first nominee mentioned in the form.</i>		

* Date of Birth and Name of Guardian to be provided in case of minor nominee(s)

Non-mandatory Details			
Address of Nominee(s)/Guardian in case of Minor			
City _____	City _____	City _____	
Pin code _____	Pin code _____	Pin code _____	
State _____	State _____	State _____	
Country _____	Country _____	Country _____	
Mobile/Telephone No. of Nominee(s)/Guardian in case of Minor			
Email ID of Nominee(s)/Guardian in case of Minor			
Nominee/Guardian (in case of Minor) Identification details – [Please tick any one and provide details of same]			
<input type="checkbox"/> Photograph & Signature	<input type="checkbox"/> Photograph & Signature	<input type="checkbox"/> Photograph & Signature	
<input type="checkbox"/> PAN	<input type="checkbox"/> PAN	<input type="checkbox"/> PAN	
<input type="checkbox"/> Aadhaar (masked – only last 4 digits visible)	<input type="checkbox"/> Aadhaar (masked – only last 4 digits visible)	<input type="checkbox"/> Aadhaar (masked – only last 4 digits visible)	
<input type="checkbox"/> Saving Bank Account No.	<input type="checkbox"/> Saving Bank Account No.	<input type="checkbox"/> Saving Bank Account No.	
<input type="checkbox"/> Proof of Identity	<input type="checkbox"/> Proof of Identity	<input type="checkbox"/> Proof of Identity	
<input type="checkbox"/> Demat Account ID	<input type="checkbox"/> Demat Account ID	<input type="checkbox"/> Demat Account ID	
* Date of Birth of Nominee			
* Name of the Guardian			
Guardian's Relationship with Nominee			

Request submitted for: ☐ Fresh Nomination ☐ Change of Existing Nomination ☐ Cancellation of Nomination

From _____

Folio No. _____

Subject to further verification and furnishing of mandatory information/documents. Please retain this slip until processed

ISC Stamp & Signature

DECLARATION & SIGNATURE(S) – As per Mode of Holding^ in Demat Accounts /MF Folio(s)			
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 in HSBC Mutual Fund.			
	Sole/First Holder	Second Holder	Third Holder
Name: (Mr./Ms.)			
Signature/Thumb^ Impression of holder	X	X	X
Witness 1 Name & Address:			
Witness 1 Signature:	X	X	X
Witness 2 Name & Address:			
Witness 2 Signature:	X	X	X

^ 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.

INSTRUCTIONS

- The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
- 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**.
- Nomination is not allowed in a folio of a Minor unitholder.
- A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee needs to be provided.
- 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.
- 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.
- A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
- 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.
- Every new nomination for a folio/account shall overwrite the existing nomination, if any.
- Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio/account.
- Nomination shall stand rescinded upon the transfer of units.
- 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.
- 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).
- The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
- 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.

CALL US AT

Please visit our website www.assetmanagement.hsbc.co.in for an updated list of Official Points of Acceptance of HSBC Mutual Fund. Please visit www.camsonline.com for an updated list of Official Points of Acceptance of our Registrar/Transfer Agent : Computer Age Management System.

TOLL FREE NUMBERS

Description	Investor related queries	Distributor related queries	Online related queries	Investor (Dialing from abroad)
Toll Free Number	1800-4190-200/1800-200-2434	1800-419-9800	1800-4190-200/1800-200-2434	+91 44 39923900
Email ID	investor.line@mutualfunds.hsbc.co.in	partner.line@mutualfunds.hsbc.co.in	onlinemf@mutualfunds.hsbc.co.in	investor.line@mutualfunds.hsbc.co.in