

Applicable for Individual Unitholders only. All unit holders need to sign (irrespective of mode of holding). Please read the instructions carefully before filling up this Form.

Date :

D	D	M	M	Y	Y	Y	Y
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Fresh Nomination – All unit holders need to sign (irrespective of mode of holding). <input type="checkbox"/> Fresh Nomination	Change of Existing Nomination / Cancellation of Nomination – Signatures as per mode of holding. <input type="checkbox"/> Change of Existing Nomination <input type="checkbox"/> Cancellation of Nomination
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Folio No.(s) (having same mode of holding and pattern)	
1.	2.
3.	4.
Investor Name (Mr./Ms.) _____	

Nomination Details

I/We wish to make a nomination and do hereby nominate the following person(s) in the above specified folio(s) who shall receive all the assets held in my/our account in the event of my/our death. **This nomination shall supersede any prior nomination made by us/me if any.**

Nomination can be made upto three nominees in the account.	Mandatory information		
	1st Nominee	2nd Nominee	3rd Nominee
Name of the Nominee (Mr./Ms.) _____			
Share of each Nominee# _____ %	_____ %	_____ %	_____ %
Date of Birth (for Minor) _____			
Relationship with the Applicant (select one) <input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____	<input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____	<input type="checkbox"/> Spouse <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Daughter <input type="checkbox"/> Son <input type="checkbox"/> Others (please specify) _____	
Nominee / Guardian (in case of Minor) Identification details [Please tick any one of the following and provide ID Number and no copies required]. <input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked – only last 4 digits visible) * * * * * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____	<input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked – only last 4 digits visible) * * * * * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____	<input type="checkbox"/> PAN _____ <input type="checkbox"/> Aadhaar (masked – only last 4 digits visible) * * * * * <input type="checkbox"/> Passport (for NRIs/OCIs/PIOs) _____ <input type="checkbox"/> Driving License _____	
Address of Nominee(s)/ Guardian in case of Minor <input type="checkbox"/> Same as First Applicant City _____ Pin code _____ State _____ Country _____	<input type="checkbox"/> Same as First Applicant City _____ Pin code _____ State _____ Country _____	<input type="checkbox"/> Same as First Applicant City _____ Pin code _____ State _____ Country _____	
Mobile No. of Nominee(s) / Guardian in case of Minor _____			
Email ID of Nominee(s)/ Guardian in case of Minor _____			
Name of the Guardian (in case Nominee is Minor) _____			
Guardian's Relationship with Nominee (non mandatory) <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian	<input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Legal Guardian	
I/We want the details of my/our nominee to be printed in the statement of holding, provided to me/us by the AMC/DP as follows; (please tick, as appropriate) <input type="checkbox"/> Name of nominee(s) with Details and Percentage <input type="checkbox"/> Nomination without Details and Percentage (Default Option)			
This nomination shall supersede any prior nomination made by the account holder(s), if any.			

Any odd lot after division shall be assigned / transferred to the first nominee mentioned in the form.

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

SIGNATURE(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 RedHex Specialized Investment Fund.		
Name of the Holder		Signature/Thumb Impression
Sole/First Holder (Mr./Ms.)	Name	Signature/Thumb[^] Impression
	Witness 1 Name & Address: _____	Witness 1 Signature:
	Witness 2 Name & Address: _____	Witness 2 Signature:
Second Holder (Mr./Ms.)	Name	Signature/Thumb[^] Impression
	Witness 1 Name & Address: _____	Witness 1 Signature:
	Witness 2 Name & Address: _____	Witness 2 Signature:
Third Holder (Mr./Ms.)	Name	Signature/Thumb[^] Impression
	Witness 1 Name & Address: _____	Witness 1 Signature:
	Witness 2 Name & Address: _____	Witness 2 Signature:

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

If the account holder affixes thumb impression instead of signature, additionally please provide a doctors certificate and the thumb impression should be notarised.

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

INSTRUCTIONS

If you are opening a new demat account/SIF folio, you have to provide nomination. Otherwise, you have to follow the specified procedure for Opt-out

- The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
- You can make nomination or change nominee any number of times without any restriction.
- You are entitled to receive acknowledgement from the AMC/RedHex SIF for each instance of providing or changing nomination.
- 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 where Minor is the unitholder.
- The signatories for this nomination form in joint folios/account, shall be the same as that of your joint SIF folio/demat account. i.e.
 - 'Either or Survivor' Folios/Accounts - any one of the holders can sign.
 - 'First holder Folios/Accounts – only First Holder can sign.
 - 'Jointly' Folios/Accounts - both holders have to sign
- A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee is 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 percentage of allocation/share for each of the nominee is not mentioned, the allocation /claim settlement shall be made equally amongst all the nominees. Any odd lot after division shall be assigned/transferred to the first nominee mentioned in the form.
- In case of demise of the investor and any one of the nominees, the regulated entities shall distribute the assets pro-rata to the remaining 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 Investment Strategies under the respective folio/account.

- Nomination shall stand rescinded upon the transfer of units.
- Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/Mutual Fund/Specialized Investment 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/Redhex SIF.
- In respect of folios/accounts where the Nomination has been registered, the AMC/Redhex SIF 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.
- Where Nominee details and Nomination Opt-Out both are mentioned, Nomination Opt-Out will be considered as "Default". Folio in such case will be updated without Nominee.

Transmission aspects

- Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single account/folio.
- In case all your nominees do not claim the assets from the AMC/RedHex SIF/DP, then the residual unclaimed asset shall continue to be with the AMC/RedHex SIF in case of SIF units and with the concerned Depository in case of Demat account.
- Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC/RedHex SIF/DP.
- 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 on pro-rata basis (as illustrated below) amongst the surviving nominees. Nominee's legal heir cannot claim the assets on behalf of deceased Nominee(s).

% share as specified by investor at the time of nomination		% assets to be apportioned to surviving nominees upon demise of investor and nominee 'A'			
Nominee	% share	Nominee	% initial share	% of A's share to be apportioned	Total % share
A	60%	A	0	0	0
B	30%	B	30%	45%	75%
C	10%	C	10%	15%	25%
Total	100%	-	40%	60%	100%

CALL US AT

Please visit our website <https://www.assetmanagement.hsbc.co.in/en/redhex-sif/contact-us> for an updated list of Official Points of Acceptance of RedHex SIF. Please visit www.camsonline.com for an updated list of Official Points of Acceptance of our Registrar/Transfer Agent : Computer Age Management Services.

TOLL FREE NUMBERS

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