



**Applicable for Individual Unitholders only (effective from September 1, 2026).
Please read the instructions carefully before filling up this Form.**

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

Date : D D M M Y Y Y Y

Fresh Nomination – All unit holders need to sign (irrespective of mode of holding). ☐ Fresh Nomination	Change of Existing Nomination/Cancellation of Nomination ☐ Change of Existing Nomination ☐ 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 can be made upto 3 nominees in the account.		Mandatory Details												
		1st Nominee				2nd Nominee				3rd Nominee				
1	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.													
	Name of the Nominee (Mr./Ms.)													
	Relationship with the Applicant <i>(select one)</i>		☐ Spouse ☐ Father ☐ Mother ☐ Son ☐ Daughter ☐ Others <i>(Pls specify)</i> _____		☐ Spouse ☐ Father ☐ Mother ☐ Son ☐ Daughter ☐ Others <i>(Pls specify)</i> _____		☐ Spouse ☐ Father ☐ Mother ☐ Son ☐ Daughter ☐ Others <i>(Pls specify)</i> _____							
	Date of Birth <i>(to be provided in case the nominee is a minor)</i>		D D M M Y Y Y Y		D D M M Y Y Y Y		D D M M Y Y Y Y							

I want the following nomination details to be printed in the account/holding statements (tick one of the boxes below):

☐ Name of the Nominee(s) ☐ Whether nomination given: Yes/No (not name of the nominee)

Optional Details of Nomination

% Share of each nominee** (equal share if % not specified)	%	%	%
Mobile No. of Nominee(s) / Guardian***			
	(Please note that the DP/MF RTA will be able to reach out to your nominee if you provide the contact details)		
Email ID of Nominee/ Guardian***			
	(Please note that the DP/MF RTA will be able to reach out to your nominee if you provide the contact details)		
Nominee/Guardian of Minor Nominee Personal identifier document [Please tick any one of the following and provide ID Number and no copies required].	☐ PAN	☐ PAN	☐ PAN
	☐ Aadhaar (masked – only last 4 digits visible) 	☐ Aadhaar (masked – only last 4 digits visible) 	☐ Aadhaar (masked – only last 4 digits visible)
	☐ Passport (for NRIs/OCIs/PIOs) 	☐ Passport (for NRIs/OCIs/PIOs) 	☐ Passport (for NRIs/OCIs/PIOs)
	☐ Driving License 	☐ Driving License 	☐ Driving License
Address of Nominee(s)/ Guardian in case of Minor	☐ Same as First Applicant	☐ Same as First Applicant	☐ Same as First Applicant
	City	City	City
	Pin code	Pin code	Pin code
	State	State	State
	Country	Country	Country
Name of the Guardian (in case Nominee is Minor)			
Guardian's Relationship with Nominee	☐ Father ☐ Mother ☐ Legal Guardian	☐ Father ☐ Mother ☐ Legal Guardian	☐ Father ☐ Mother ☐ Legal Guardian
** Any odd lot after division shall be transferred to the first nominee mentioned in the form. *** The aforesaid details shall be optionally provided for the Guardian, in case of nominee is a minor.			



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

4 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 HSBC Mutual 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. Notes: - Investor have the right to receive acknowledgement of the nomination form for each instance of nomination/subsequent change. The consent of all the joint-holders shall be required for providing or changing nominee regardless of mode of holding. - In case of multiple nominees, upon the demise of the investor, the nominees may either continue in the same account / folio or open separate account /folio, for their respective holding. - wet signature (signature of witness shall not be required). However, if thumb impression (instead of wet signature) is affixed, then the same shall be witnessed by two persons and details of such witnesses (name and address) shall be duly provided in this form. If the account holder affixes thumb impression instead of signature, additionally please provide a doctors certificate and the thumb impression should be notarised.		

INSTRUCTIONS

- For all single holding accounts/folios investor shall mandatorily provide nomination, unless declaration form for 'opt-out' is submitted.
- The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly. Nomination will be optional for jointly held demat account/folios.
- You can make nomination or change nominee any number of times without any restriction. The consent of all the joint-holders shall be required for providing or changing nominee regardless of mode of holding.
- You are entitled to receive an acknowledgement from the AMC/DP 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.
- 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.
- The investors shall have an option to submit the nomination either online or offline.
- 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 multiple nominees, upon the demise of the investor, the nominees may either continue in the same account / folio or open separate account / folio, for their respective holding.
- 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.
- 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.
- 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/DP, then the residual unclaimed asset shall continue to be with the AMC in case of MF 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/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 amongst the surviving nominees. Nominee's legal heir cannot claim the assets on behalf of deceased Nominee(s).

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 Services.

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