

Nomination Form

 B -106, Tirupati Plaza, Nr Collector office ,Athwagate, Surat-395001										FORM FOR NOMINATION (To be filled in by individual applying singly or jointly)																			
Date	D	D	M	M	Y	Y	Y	Y	DP ID											Client ID									
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 1 st Nominee							Details of 2 nd Nominee							Details of 3 rd Nominee					
1	Name of the nominee(s) (Mr./Ms.)																												
2	Share of each Nominee		Equally [If not equally, please specify percentage]							%							%							%					
Any odd lot after division shall be transferred to the first nominee mentioned in the form.																													
3	Relationship With the Applicant (If Any)																												
4	Address of Nominee(s) City / Place: State & Country:																												
			PIN Code																										
5	Mobile / Telephone No. of nominee(s)																												
6	Email ID of nominee(s)																												
7	Nominee Identification details – [Please tick any one of following and provide details of same] ☐ Photograph & Signature ☐ PAN ☐ Aadhaar ☐ Saving Bank account no. ☐ Proof of Identity ☐ Demat Account ID																												
Sr. Nos. 8 -14 should be filled only if nominee(s) is a minor:																													
8	Date of Birth {in case of minor nominee(s)}																												
9	Name of Guardian (Mr./Ms.) {in case of minor nominee(s)}																												
10	Address of Guardian(s)																												

PORTFOLIO MANAGEMENT SERVICE APPLICATION FORM

Portfolio Manager's SEBI Registration No. INP000007164



	City / Place: State & Country:				
	PIN Code				
11	Mobile / Telephone no. of Guardian				
12	Email ID of Guardian				
13	Relationship of Guardian with nominee				
14	Guardian Identification details – [Please tick any one of following and provide details of same] ☐ Photograph & Signature ☐ PAN ☐ Aadhaar Saving Bank account no. ☐ Proof of Identity ☐ Demat Account ID				
Name(s) of holder(s)					Signature(s) of holder*
Sole / First Holder (Mr./Ms.)					
Second Holder (Mr./Ms.)					
Third Holder (Mr./Ms.)					

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

WITNESS

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

Declaration Form for opting out of nomination

 CKREDENCE™ WEALTH Your Journey To Prosperity	Date	D	D	M	M	Y	Y	Y	Y
	B -106, Tirupati Plaza, Nr Collector office ,Athwagate, Surat-395001								
DP ID									
Client ID (only for Demat account)									
Sole/First Holder Name									
Second Holder Name									
Third Holder Name									
I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our trading / 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 trading / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the trading / demat account.									
Name and Signature of Holder(s)* 1. _____ 2. _____ 3. _____									

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