

**Can the first unit holder name be deleted/changed?**

No. The first unit holder's name in a folio cannot be deleted. Addition / deletion of holders is allowed in any case whether it is single, joint or any one or survivor. Deletion of first Unit Holder name (in respect of any mode of holding) is allowed only in case of transmission.

**Is addition / deletion of holders allowed in case the unit is subject to lien / charged / pledged?**

No. In case of the units is subject to lien / charge / pledged, request for addition / deletion of joint holders will not be accepted.

**What are the documents required For Addition of holders?**

Below given is the list of documents for addition of holders.

- Duly filled and signed form(s) for addition of holders
- Acknowledgement / declaration from proposed joint holders
- KYC Acknowledgement Letter / KYC Application form with prescribed documents of proposed joint holders
- Duly filled and signed FATCA form

**What are the documents required For Deletion of holders?**

Below given is the list of documents for deletion of holders except First Holder.

- Duly filled and signed form(s) for deletion of holders
- Declaration of existing holders
- In case of death of any unit holder, the surviving joint holder(s) have to follow the transmission procedure on the name of the surviving joint holder(s)

**Will any stamp duty be required to be paid on the Form and Declaration?**

Yes, each Form with declaration depending upon the type of request needs to be stamped by way of franking amounting to Rs. 300/-.

**How much time will it take to process my request for addition / deletion of holders?**

The request for addition / deletion of holders will get processed within 10 working days (subject to verification /validity of documents) post which you will receive a confirmation mail / letter with regard to registration / rejection of your request.

**What will be my mode of holding for the folio?**

In case of deletion of all holders in a folio other than the first holder the mode of holding will be registered as 'Single'.

For other scenarios, the investor has to select the respective option viz 1.Joint 2.Anyone or Survivor for mode of holding in the form.

**Do I need to submit a request for Nominee registration also?**

Yes. A fresh nomination form duly signed by the existing holder and proposed Joint holders to be submitted along with the request.

**How many holders can be added in the folio?**

Maximum two joint holders can be registered in a folio, such that there are total number of three holders in the folio.

**Can a minor be added as a joint holder?**

No. As per AMFI guidelines, "The minor shall be the first and the sole holder in a Folio. Minor investor cannot be a joint holder in a folio.

**FORM FOR ADDITION OF JOINT HOLDER/s (Declaration from Existing Investors)**

**Stamp Duty of Rs. 300/- to be affixed on Form by way of franking #**

Please complete this form in BLOCK CAPITAL LETTERS and duly signed by all Existing account holders.

**Folio Number** : \_\_\_\_\_

**Existing First Holder's Name:** \_\_\_\_\_

With reference to the above account, I/We wish to add the below mentioned holder's name/s as joint holder/s OR after deleting the existing joint holders. In this regard please find their details:

	<b>Proposed Name Being Added</b>	<b>PAN ^</b>	<b>KYC Compliant / KYC Application Form is being submitted along with this application</b>
2 <sup>nd</sup> Holder			<input type="checkbox"/> YES/ <input type="checkbox"/> NO
3 <sup>rd</sup> Holder			<input type="checkbox"/> YES/ <input type="checkbox"/> NO

^ Mandatory Field (Please submit KYC acknowledgement)

Please tick the relevant option:

**Mode of Holding (after addition):**       Joint                               Anyone or Survivor

I / we agree and confirm that the existing nomination under the folio stands rescinded on the addition of names in the folio.

In consideration of Quantum Mutual Fund (QMF) agreeing to act on our request to add the names as stated above, in respect of the aforesaid Folio, I /We the persons who sign herein below do hereby jointly and severally agree and undertake to indemnify and keep indemnified the AMC / QMF, all their directors, officers, employees, successors, and assigns harmless from and against, any and all suits, actions and proceedings, claims liabilities, losses, damages, costs and expenses, arising directly or indirectly in connection with recording , based upon our request, the addition of names in the aforesaid Folio.

**Signature**  
**Existing First Account Holder**

**Signature**  
**Existing Second Joint Holder**

**Signature**  
**Existing Third Joint Holder**

**Note :**

- 1 Account Holders whose name is being deleted /replaced is also requested to sign this form.**
- 2 Please tick wherever applicable.**
- 3. To be submitted on stamp paper incase mode of holding other than Single.**

**Stamp Duty of Rs. 300/- to be affixed on Form #**

**New Joint Holder's Addition Confirmation/Declaration**

Please complete this form in BLOCK CAPITAL LETTERS and duly signed by the proposed account holder(s).

**Folio Number** : \_\_\_\_\_

**Existing First Holder's Name** : \_\_\_\_\_

I/We herein mentioned below wish to accept and confirm that I/We have no objection in my / our names/s being added and registered in the above stated folio number as the second / third joint holder after deleting/replacing the existing second / third joint holders.

	<b>Proposed Name Being added</b>	<b>PAN<sup>^</sup></b>	<b>KYC Compliant / KYC Application Form is being submitted along with this application</b>
2 <sup>nd</sup> Holder			<input type="checkbox"/> YES/ <input type="checkbox"/> NO
3 <sup>rd</sup> Holder			<input type="checkbox"/> YES/ <input type="checkbox"/> NO

<sup>^</sup> Mandatory Field (Please submit KYC acknowledgement)

**Please tick the relevant option:**

**Mode of Holding (after addition) :**       Joint                               Anyone or Survivor

I / we agree and confirm that the existing nomination under the folio stands rescinded on the addition of name/(s) in a folio.

Enclosed the New Nomination Form duly signed by the existing first holder /s and proposed holders for registration of new nominee/s in the folio.

In consideration of Quantum Mutual Fund (QMF) agreeing to act on our request to add the names as stated above, in respect of the aforesaid Folio, I /We the persons who sign herein below do hereby jointly and severally agree and undertake to indemnify and keep indemnified the AMC / QMF, all their directors, officers, employees, successors, and assigns harmless from and against, any and all suits, actions and proceedings, claims liabilities, losses, damages, costs and expenses, arising directly or indirectly in connection with recording , based upon our request, the addition of names in the aforesaid Folio.

**Signature Proposed Second Joint Holder**

**Signature Proposed Third Joint Holder**

**Note :**

- 1 Account Holders whose name is being added is requested to sign this form.**
- 2 Please tick wherever applicable.**
- 3. To be submitted on stamp paper incase mode of holding other than Single.**



**Stamp Duty of Rs. 300/- to be affixed on Form by way of Franking**

**Existing Joint Holder's Deletion Confirmation/Declaration**

Please complete this form in BLOCK CAPITAL LETTERS and duly signed by the account holder(s) whose name/(s) are being deleted.

**Folio Number** : \_\_\_\_\_

**Existing First Holder's Name :**

\_\_\_\_\_

I/We herein mentioned below wish to accept and confirm that I/We have no objection in my / our names/s being deleted in the above stated folio number as the second/third joint holder.

	<b>Existing Name being deleted</b>	<b>PAN^</b>
2 <sup>nd</sup> Holder		
3 <sup>rd</sup> Holder		

^ Mandatory Field

I / we agree and confirm that the existing nomination under the folio stands rescinded on the deletion of name/(s) in the folio.

In consideration of Quantum Mutual Fund (QMF) agreeing to act on our request to delete the names as stated above, in respect of the aforesaid Folio, I /We the persons who sign herein below do hereby jointly and severally agree and undertake to indemnify and keep indemnified the AMC / QMF, all their directors, officers, employees, successors, and assigns harmless from and against, any and all suits, actions and proceedings, claims liabilities, losses, damages, costs and expenses, arising directly or indirectly in connection with recording , based upon our request, the deletion of names in the aforesaid Folio.

**Signature Existing Second Joint Holder**

**Signature Existing Third Joint Holder**

**Note :**

**1 Account Holders whose name is being deleted is requested to sign this form.**