



# LYNEAR WEALTH MANAGEMENT (PVT) LIMITED

## Nomination Form

### The Fund Registrar

Dear Sir/Madam,

I  (Full name of the unit holder),

holder of National Identity Card / Passport No. / Driver's License No.  of

(Address of the unit holder), do

hereby declare that I have invested funds in collective investment schemes identified below operated by LYNEAR Wealth Management (Private) Limited to subscribe to and purchase units therein through the following investment account:

The investment has been made **individually / jointly**, under account number:

#### If jointly invested:

Jointly with  (Full name of joint

holder), holder of National Identity Card / Driver's License / Passport No.  (hereinafter referred to

collectively as the "Unit Holder/s").

In relation to investments made in unit trusts identified above under the above-mentioned account number, in terms of Section 544 of the Civil Procedure Code Act No. 02 of 1889 (as amended), I hereby nominate the following person(s):

LYNEAR Wealth Dynamic Opportunities Fund  LYNEAR Wealth Income Fund  LYNEAR Wealth Liquid Money Fund

Please tick all Funds for which the following nomination is valid.

Full Name of Nominee	Address of Nominee	NIC / Driver's License / Passport No	Contact Number	Percentage of Entitlement

as the person/s to whom (i) any units in the unit trusts identified above held by me and in my name, pursuant to the investment, at the time of my death ("Units") should be transferred upon my death and (ii) any monies that I am entitled to pursuant to the investment and not paid to me as at the time of my death (including any monies invested for which no units have not yet been issued, distributions paid on units and/or proceeds of redemptions) ("Monetary Entitlements") should be paid upon my death.

I understand that such nomination shall take effect upon my death notwithstanding anything to the contrary declared in any last will or writing of a testamentary nature heretofore or hereinafter made by me and that this nomination shall be subject to the laws of Sri Lanka.

This nomination revokes any previous nominations made by me in respect of Units and Monetary Entitlements and shall be in force until I expressly revoke it by notice in writing delivered to you or by subsequent nomination made duly by me.

I declare that the transfer of the Units and the payment of the Monetary Entitlements to the nominee/s referred to above in the manner set forth in this nomination form shall be a full and complete discharge of the obligation of LYNEAR Wealth Management (Pvt) Ltd in respect of the Units and the Monetary Entitlements as provided in section 544 (5) of the said Act.

I hereby agree, acknowledge and undertake that the nomination made by me hereby, is subject to the Terms and Conditions contained overleaf, which are deemed to be Terms and Conditions stipulated by me with regard to such nomination.

## Terms and Conditions

1. Subject to the applicable laws and the firm's general right of set-off, the nomination shall have effect upon the death of the unit holder notwithstanding anything to the contrary contained in any last will of the unit holder.
2. The nomination will stand revoked under the following circumstances
  - (a) on the death of the nominee in the lifetime of the unit holder.
  - (b) by written notice of revocation of the nomination, signed by the unit holder in the presence of a witness (who shall attest the signature of the nominator).
  - (c) by subsequent nomination duly made by the unit holder and delivered to LYNEAR Wealth Management (Private) Limited.
3. The Units will be transferred to and the Monetary Entitlements will be paid to the person/persons legally entitled thereto after legal procedure in the event this nomination cannot be given effect to.
4. Transfer of Units and the payment of Monetary Entitlements will be made to a nominee only on production of the death certificate of the unit holder and proof of identity of the nominee. LYNEAR Wealth Management (Private) Limited reserves the right to request for any information / documents that may be required to establish such identity.
5. In the event of there being more than one nominee and no proportion for distribution is indicated, the Units and Monetary Entitlements will be transferred or paid to the nominees in equal shares.
6. The signature of the unit holder should be witnessed by two persons.
7. In the case of a joint account, each joint account holder shall be required to submit a separate nomination form, clearly referencing the joint account, in order for the nomination to be deemed valid in respect of the said joint holding.
8. In the event of a joint account where the Investment is for the joint holding identified above, on the demise of one joint holder, the nomination of such deceased joint holder will automatically cease to be valid and be of force and effect and the Units and Monetary Entitlements will automatically vest in, accrue to and belong to the surviving joint holder. For the avoidance of doubt, where one joint holder dies, any nomination made by the surviving joint holder in respect of the Units and Monetary Entitlements forming part of such joint holding will continue to be valid and be of force and effect, as if such nomination has been made in respect of a sole holding of such surviving holder. In the event, both joint holders die together or within ten (10) days of each other, then the legal representatives / nominees of each holder, shall be deemed to be entitled to one half (1/2) of the Units and Monetary Entitlements forming part of the joint holding at the time of the death of the joint holders and any nomination made by either joint holder shall be valid and be of force and effect and shall be deemed to be a nomination made in respect of one half (1/2) of the Units and Monetary Entitlements forming part of the joint holding.
9. Copies of valid identification documents of the respective nominee/s shall be submitted together with the nomination form. LYNEAR Wealth Management (Private) Limited reserves the right to reject any nomination that is not accompanied by such documentation.

Unit Holder Signature

D	D	M	M	Y	Y	Y	Y
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Date

Full Name of Witness	Address of Witness	Signature	Date	NIC / Passport / Driver's License
1.				
2.				