

Demise Help Guide (Updated on 24th August 2026, CDSL Communique 500 & 575)

Sr. No.	Documents Required as per Holding Values and Nominee Status →→→	QTP Holding Value up to 30,000 (by Parents or Spouse or Child or Parents-in-Law)		Simplified Process Holding Value from 30,001 to 30,00,000		Above Threshold Holding Value more than 30,00,000	
		Nominee	No Nominee	Nominee	No Nominee	Nominee	No Nominee
1	Transmission Form (Tradebulls) Annexure 7.1 (Sole Holder Death) OR Annexure 7.2 (Joint Holder Death)	✓	✓	✓	✓	✓	✓
2	Annexure-2 /QTP	✗	✓	✗	✗	✗	✗
3	Annexure-3 /Other than QTP	✓	✗	✓	✓	✓	✓
4	Annexure-4 /Bond of Indemnity	✗	✗	✗	✓	✗	✓
5	Annexure-5 /Affidavit	✗	✗	✗	✓	✗	✓
6	Latest CML & Notifier Application	✓	✓	✓	✓	✓	✓
7	Death Certificate (read notes)	✓	✓	✓	✓	✓	✓
8	Any one: Succession Certificate, Legal Heir Certificate, Letter of Administration, Court Decree	✗	✗	✗	✗	✗	✓
9	PAN of, Deceased Holder, Claimant, Nominee, Joint Holders	✓	✓	✓	✓	✓	✓

Demise Help Guide (Updated on 24th August 2026, CDSL Communique 500 & 575)

Sr. No.	Documents Required as per Holding Values and Nominee Status →→→	QTP Holding Value up to 30,000 (by Parents or Spouse or Child or Parents-in-Law)		Simplified Process Holding Value from 30,001 to 30,00,000		Above Threshold Holding Value more than 30,00,000	
		Nominee	No Nominee	Nominee	No Nominee	Nominee	No Nominee
10	Aadhar of , (read notes) Deceased Holder, Claimant, Nominee, Joint Holders	✓	✓	✓	✓	✓	✓
11	Nominee Declaration	✓	✓	✓	✓	✓	✓
12	If nominee/claimant/legal heir is/are Minor provide any one, Birth Certificate, School Leaving Certificate, Passport, Aadhar (attested by Guardian)	✓	✓	✓	✓	✓	✓
13	KYC of Guardian if, Nominee or clamant are minor or unsound mind	✓	✓	✓	✓	✓	✓

Demise Help Guide (Updated on 24th August 2026, CDSL Communique 500 & 575)

Notes	
1	Where the original death certificate is issued in a language other than English, the claimant shall submit a self-certified English translation along with the certified copy of the original death certificate
2	In absence of original death certificate, QR based death certificate is valid
3	Notarized/Gazetted Officer/Judicial Magistrate First Class (JMFC) attested copy of Death Certificate is valid.
4	Where the original death certificate is issued in a language other than English, the claimant shall submit a self-certified English translation along with the certified copy of the original death certificate.
5	Aadhar should be masked, visible only last 4 digits of Aadhar Number
6	Self-attestation is required on all ID proof and Address Proofs