

:: User Guide For RE-KYC / Closure ::

(Trading / Demat Account)

1. RE-KYC LOGIN :-

- a. AP branch Login
- b. Direct Client Login

2. Enter Client Code :-

- a. AP Login – (no OTP required)
- b. Direct Client Login – (OTP required)

3. What to Modify :-

Example – Mobile Number, Email-ID, Bank Details, Address, Occupation/Income, Nomination, Account Closure.

- In Case Of Mobile Number & Email-ID modification :-

Existing Data will be Displayed, you need to insert the modified/ revised Data and then generate an OTP.
Documents Required – PAN CARD & SIGNATURE.

- In case of Bank Account Modification :-

Existing Bank account details will be Displayed, you need to insert the new Bank Account details.
Documents Required – Cancel Cheque with name Printed/Bank Passbook/Bank statement.

- In Case of Address Modification :-

Existing Address details will be shown, insert the new Address Details.

Documents Required – Aadhar Card/Passport copy/Voter ID/Driving License/NREGA JOB CARD/National Population Registered Letter (Anyone of the above with the new address updated)

Next Step – Upload PAN CARD, Signature & Photo

Next Step – IPV through link sent to the registered Email Address

Next Step – Esign and generate OTP

- In Case of Occupation/Income :-

Changes in Income Range to be filled.

Documents Required – Self Declaration Form Regarding Changes income range.

- In Case Of Nominee Details :-

Add Basic details of the Nominee as PAN CARD, AADHAR CARD, And Share percentage.

Documents Required – PAN CARD/AADHAR CARD.

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- In Case Of Account Closure :-

Request you to clear the debit balance (If Any) before processing.

Upload Client Master Report (CMR) for share transfer (If any)

You need to select which account you want to close (Trading/Demat/Both) & Reason for Account Closure.