

Registration of Client on Mutual Fund Portal

Existing Client/ New Client

1	Name of Applicant		
2	Copy of PAN Card	Attached	Yes/No
3	Copy of Aadhar Card	Attached	Yes/No
4	Cancel Cheque	Attached	Yes/No
5	Client Address with PIN Code		
6	Address Type	Residential Business Registered Office	
7	Place of Birth (State Name)		
8	Country of Birth		
9	Tax Residency other than India	Yes No	
10	Tax Status	Individual HUF	LLP Co.
11	E-mail ID		
12	Mobile No.		
13	Occupation		
14	Nominee Name & DOB		
15	Relation with Nominee		
16	Nominee Address if different from Applicant		
17	Guardian Details (if nominee is minor)	Pan No. Relation Address	
18	Applicant is PEP (politically exposed person)	Yes / No	
19	Applicant is related to PEP	Yes / No	
20	Annual Income	01 - 05 Lacs 10 – 25 Lacs Above 1Crore	05 - 10 Lacs 25Lacs – 1Crore
21	Source of Income/Wealth	Ancestral Property Business Income Gift Rental Income Salary Other	
20	ACH Amount (Automated Clearing House) For Automatic Debit SIP amount	10K 50K 2 Lacs	25K 1 Lacs 5 Lacs

If Client is not KYC complied (CVL Verified Client) need to provide following additional Documents

1. KRA Form Duly Filled and Signed
2. Self certified copy of Pan Card
3. Self certified copy of Aadhar Card
4. Self certified Copy of Proof of Address