



**Account Details Addition / Modification Request Form - Trading**

Dear Sir / Madam

I / We request you to make the following additions / modifications to my / our Trading account in your records.  
 PLEASE FILL ALL THE DETAILS IN BLOCK LETTERS IN ENGLISH. Please mark ( ✓ ) on the appropriate column

**Account Holder's Details**

Trading Code								PAN							
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Client Name

1. Annual Income	<input type="checkbox"/> Up to 1 Lac	<input type="checkbox"/> 1 -5 Lac	<input type="checkbox"/> 5 -10 Lac	<input type="checkbox"/> 10 -25 Lac	<input type="checkbox"/> 25 -50 Lac	<input type="checkbox"/> 1 Cr. & Above
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OR Net-Worth\* Rs. \_\_\_\_\_ as on Date \_\_\_\_/\_\_\_\_/ 20\_\_\_\_ (\*Net-worth should not be older than 1 Year)

2. Contact Details	Existing Details	New Details
Primary Mob	<input type="text"/>	Primary Mob <input type="text"/>
Primary Mail	<input type="text"/>	Primary Mail <input type="text"/>

3. Bank Details:	Existing Details	New Details
	Bank Name & Branch :	Bank Name & Branch :
	A/c No. :	A/c No. :
	A/c Type :	A/c Type :

4. Address Details:	Existing Details	New Details
	Correspondence <input type="checkbox"/>	Address: <input type="text"/>
	Permanent <input type="checkbox"/>	City: <input type="text"/> State: <input type="text"/>
		Country: <input type="text"/> Pin Code: <input type="text"/>

5. Any Other PAN / DOB / Occupation / Status / Others etc	Existing Details	New Details
	<input type="text"/>	<input type="text"/>

**ECN / E-Statement Consent :-**  
 I/we aware that the Member has to provide physical contract note in respect of all the trades placed by me unless I/we our self want the same in the electronic form.  
 I/we aware that the Member has to provide electronic contract note for my convenience on my request only.  
 Though the Member is required to deliver physical contract note, I/we find that it is inconvenient for me to receive physical contract notes. Therefore, I/we/am/are voluntarily requesting for delivery of electronic contract note pertaining to all the trades carried out / ordered by me/us.  
 I/we have access to a computer and am a regular internet user, having sufficient knowledge of handling the email operations.  
 My email id has been created by me/us and not by someone else.  
 I/we am/are aware that this declaration form should be in English or in any other language known to me/us.  
 I/we am/are aware that non-receipt of bounced mail notification by the member shall amount to delivery of the contract note at the above e-mail ID.  
 The above declaration and the guidelines for ECN / E-Statement Consent have been read and understood by me/us. I/we am/are aware of the risk involved in dispensing with the physical contract note , Reports and E-Statement and other communication, and do hereby take full responsibility for the same.  
 I / We hereby give our consent and authorize you to send digital contract notes, bills, ledgers, statement of funds and securities, transaction statements, Monthly/Quarterly demat statement of accounts / holding statement(s) / bills or other reports, Statement(S), related notices, Circulars, amendments and such other correspondence, documents, records by whatever name called (hereafter referred to as "statement (s)" issued from time to time, at the above mentioned email.

6. ECN/E-Statement activation and other electronic communication for Trading Yes  No

**Declaration:** - I/We hereby declare that the details furnished above are true and correct to the best of my/our knowledge and belief. In case any of the above mentioned information is found to be false or untrue or misleading or misrepresenting, I am/we are aware that I/we may be held liable for it.  
 -All other details available into my/our client master of trading and DP which are not modifying with this request form, are true and correct to the best of my/our knowledge and belief and I/We agree and responsible, for any issue occurred due to not updated proper detail in my/our account.  
 - I/ We authorized you to reach out to me/ us for any confirmations like Order Verification, Delivery Confirmation, Trade Confirmation, Welcome call etc. through Call/ IVR , E-Mail/ SMS or other source of communication on the Mobile no. recorded/ registered with us, irrespective of User's registration with DND registry of TRAI.  
 -I/ We agree to auto-renew my/ us consent after every 180 days until I/ We opt-out

Client Name	First/Sole Holder	Second Holder	Third Holder
Signature	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Any one Proof Required from the following list** (All document must be Self attested by all joint holders): \*Self Attested PAN CARD copy is mandatory. IPV/OSV seal & detail is mandatory  
 \*If any proof of identity or address is in a foreign language, then translation into English is required  
**Bank details:** Cancelled cheque with name printed/ copy of bank passbook/ latest bank statement of accounts duly attested by bank authorities.  
**Address details:** Copy of Ration card, Passport, PIO Card, OCI Card, Voter ID card, Driving license, Bank passbook, Electricity bill / Land line Telephone bill (not more than 2 months old)  
 \*- Please strike off which are not applicable.

VERIFIED BY ..... UPDATED BY .....

**ACKNOWLEDGMENT RECEIPT**

We hereby acknowledge the receipt of the your instruction for modification of the following Account Subject to verification Date : \_\_\_\_\_

Trading Code :-	PAN :-				
Modification Request (Tick)	Annual Income	Contact Details	Bank	Address	Any Others (Specify below)
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(Specify Reason)	<input type="text"/>				