**Agent Registration Forms & Pages**

Page 1

1. Name 2. Surname

3. Email

4. Mobile number OTP Verification

5. Location

Uploads

5. PAN upload

6. Adhaar upload

Page 2

|  |  |
| --- | --- |
| What is your primary source of income or what you do for living ? | Descriptive |
| Which company do you work for or what is the name of your employer ? | Descriptive |
| What is your role and position in your current company ? | Descriptive |
| Does your employer allows you to make secondary source of income ? | YES/NO |
| **Explain** : certain companies get in a contract with their employees, mostly over a certain time period to abide certain guidelines like salary, nature of role, bond, or restriction to work anywhere else or generate any another income. If your company has any such policy please confirm with your HR or respective authority. |  |
| Is any member of your family in the role of product, credit or sales in any Bank or Financial services | YES/NO |
| Have your previously worked in Financial Industry ? | YES/NO |
| 5a) If YES, |  |
| - what was your role and position ? | Descriptive |
| - How many years have your worked in the industry ? | Descriptive |
| - How many years since your are not working in the industry ? | Descriptive |
| - Have you worked as an agent, broker in financial sector ? | Descriptive |
| 5b) If No, <NULL> |  |
| Are you or any direct member of your family works in Politics or Government ? | YES/NO |
|  |  |

***Declaration statement check for the information, and the responsibility of the correct information is with user.***

Page 3

**Banking details**

- Name of the bank

- Account name

- Account number

- BSB code

*Disclaimer : all payouts shall be transferred to this account.*

*Please ensure the account given is linked to PAN-adhaar. (Tick box, do not proceed otherwise)*

**Terms & Condition**

PDF files to read, use tick boxes outside

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| Read only | *Data Privacy* | *trust that we keep the data secure and will not share with third party* | Tick box |
| Read only | *Compliance* | *RBI compliance, Lending product and selling compliance, Financial freedom compliance* | Tick box |
| Read only | *Duties and consumer protection* | *conduct with the customer, and rules of engagement. Information transparency, authentication of sales, consequences of wrong sales, duties as an agent partner with financial freedom.* | Tick box |
| Signature of agent partner | Agreement | Payout slab,  Money transfer policy  Cancelation policy  Due diligence  Wrongful activities or breach of contract | Edit file |
| Read only | Training & Module | Training requirement and need  Industry standards and accreditation  Up skill Badge with financial freedom | Tick box |

*————————————- Finish the registration ———————————————————-*

Steps

* Check info – approval or rejection
* Notify the agent partner – phone and email.
* Store info in database – modify, update – tutorials, modules, training.
* Update the agreement, other compliance and duty details on agent application