

Account Details Addition / Modification Request Form - Trading Account

Date: _____

Dear Sir / Madam,

I / We request you to make the following additions / modifications to my / our Trading account in your records.

Client Name:		Trading Code:	
Modification request for (Specify reason)	<input type="checkbox"/> Annual Income <input type="checkbox"/> Bank <input type="checkbox"/> Address <input type="checkbox"/> Contact Details <input type="checkbox"/> ECN <input type="checkbox"/> DP Details for Trading A/c		

PLEASE FILL ALL THE DETAILS IN BLOCK LETTERS IN ENGLISH. Please mark (✓) on the appropriate column.

Account Holder's Details PAN NO. _____

1. Annual Income	<input type="checkbox"/> Upto 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"/> 50-1cr <input type="checkbox"/> 1cr & above	Networth as on Date Rs. _____
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2. Bank & Dividend Details	Existing Details (As per Trading Account)		New Details <input type="checkbox"/> Additional <input type="checkbox"/> Default Bank for PAYOUT	
	Bank Name & Branch:		Bank Name & Branch:	
	A/c No.:		A/c No.:	
	A/c Type:		A/c Type:	
	IFSC Code:		IFSC Code:	
	MICR Code:		MICR Code:	

3. Address Details	Existing Details		New Details	
	Address:		Address:	
	City:		City:	
	State:		State:	
	Country:		Country:	

4. Contact Details	Existing Details		New Details	
	Tel.:		Tel.:	
	Mob.:		Mob.:	
	Email ID:		Email ID:	

5. Electronic communication for Trading account:	<input type="checkbox"/> Yes <input type="checkbox"/> No
I / We hereby give our consent and authorize you to send digital contract notes, bills, ledgers, statement of funds and securities on Monthly / Quarterly basis 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 new email id: _____	

6. DP Details for Trading A/c	Pay-in	Pay-out
DP Name:	DP ID:	Client ID:

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.

Client Name	First / Sole Holder
Signature	Signature

Any one Proof Required from the following list (Self attested by client and all joint holders, if any):

Bank details: Copy of cheque with name printed, copy of bank passbook, copy of bank statement of accounts duly attested by bank authorities not older than 4 months with cancelled cheque.

Address details: Copy of Ration card, Aadhar card, Passport, Voter ID card, Driving license, Bank passbook, Electricity bill / Land line Telephone bill (not more than 3 months old).

DP details: Latest transaction statement / holding statement / CML copy.

For Branch use only:	
Document Received	Client Signature Verified By
Branch / RO Name:	Employee Name:
Date:	Employee Code:

For CSO use only:
CSO RECEIVED STAMP

(Please Tear Here)

ACKNOWLEDGMENT RECEIPT

We hereby acknowledge the receipt of the your instruction for modification of the following Account subject to verification:

Client Name:		Trading Code:	
Modification request for (Specify reason)	<input type="checkbox"/> Annual Income <input type="checkbox"/> Bank <input type="checkbox"/> Address <input type="checkbox"/> Contact Details <input type="checkbox"/> ECN <input type="checkbox"/> DP Details for Trading A/c		

Trading Member Seal and Signature