



# OPTISM FINSEC

D-180/G, 1st Floor Freedom Fighter colony, South Delhi 110068

Website: www.optismfinsec.com

Passport  
Photograph  
( for Individual  
Only)

## For HO use only

Associate Code:

Allotment Date

## 1. Key Contact Details

\* Name ( Mr./Ms./M/s.) (BLOCK LETTERS)

\* Address for Communications:

\* City  \* State  \* Pin

\* Tel No.  STD Code  \* Tel No. 2  STD Code

\* Mobile No.  \* Fax No.  STD Code

\* Email:

Tax Status: ☐ Individual ☐ Sole Proprietorship ☐ Partnership Firm Society/Trust ☐ Pvt. Ltd. Company ☐ Public Ltd Co. ☐ Others

## 2. Bank Account Details for Brokerage/other payments

\* Beneficiary Name

\* Bank Name

\* Branch

\* City

\* MICR Code

\* Account No

\* IFSC Code

- ☐ Savings ☐ Direct Credit (DC by default with Banks listed overleaf and/or for whom IFSC code to provided)  
☐ Current ☐ Warrant (Couriered to the address mentioned above)

## 3. Additional Information

**Individual** **Corporate**

\* PAN :

\* Date of Birth:

\* Education Qualification:

\* PAN :

\* Date of Incorporation :

\* Contact Person :

\* Designation :

## Certification Details (Please attach copy of Certificate)

- ☐ AMFI Reg. No.  Passed on  Valid Upto   
☐ IRDA Reg. No.  Passed on  Valid Upto   
☐ NCFM Reg. No.  Passed on  Valid Upto   
☐ Other(if any) Reg. No.  Passed on  Valid Upto

## 4. Business Details

No of Investors  Experience in selling :  Year

Please Tick ( ✓ )

☐ Insurance : Rs.  ☐ Bonds : Rs.  ☐ FD's : Rs.  ☐ IPO's : Rs.

☐ Cumulative Date to Funds Mobilization in MF's : Rs.  ☐ Last Year MF : Rs.

Association as a sub broker/Franchise for Mutual Funds ☐ Yes ☐ No

If Yes, Details

## 5. Infrastructure Details

Operating From office : ☐ Yes ☐ No

No of Associates :

No of Branches :

No of Employee :

## 6. Referral ( any Distributor you would recommend)

Broker Name 1 :  Contact No.

Broker Name 2 :  Contact No.