Instigo

DIY – Client journey for online account opening

Open website www.elitewealth.in



OUR EXPERTISE DELIVERED ON YOUR TERMS



Click on online Account opening Button

elitewealth.in/online-account-opening/





Products Finplan Portfolio Management Research Reports Platform Webinar Whats New Login Platform

Online Account Opening

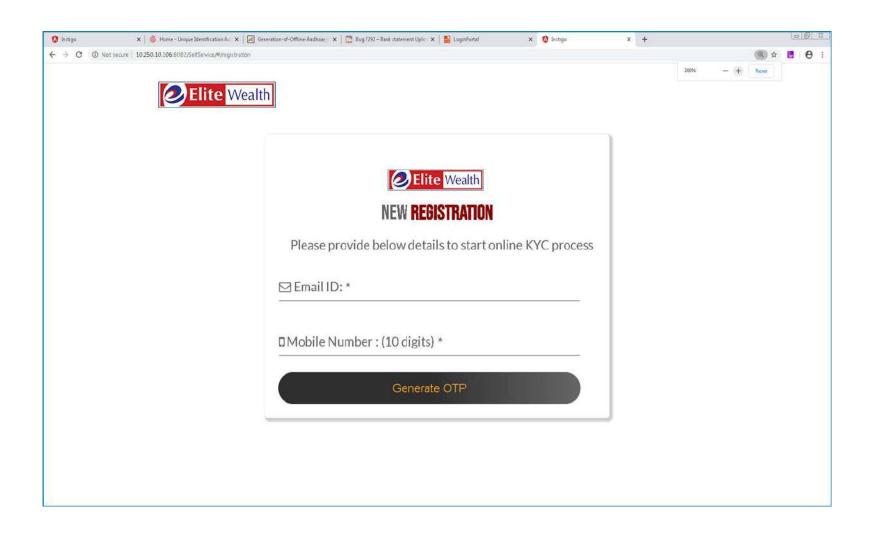
DIY for Opening of Online Demat and Trading Account

Online Account Opening

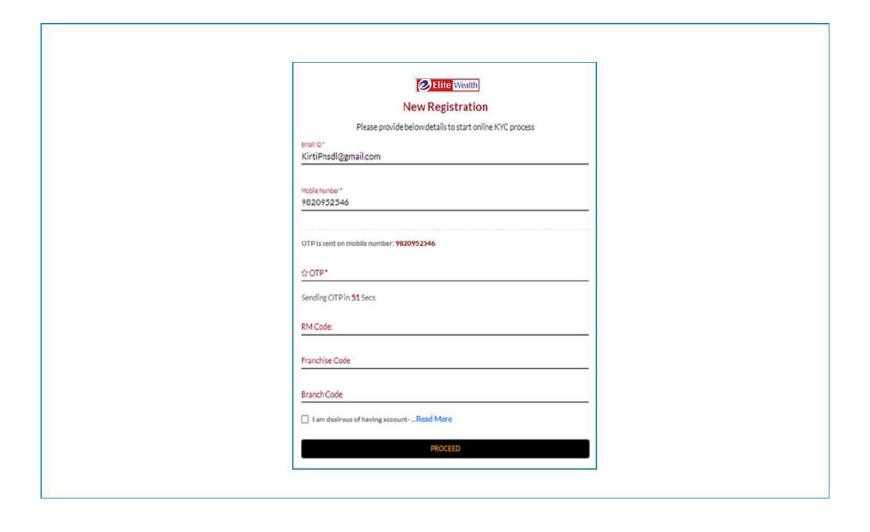
Important points to be noted for eKYC:

- 1. POA from any client is required to be obtained physically on the stamp paper itself and the client is required to send the same in hard copy. POA will be activated only once we receive the original signed Physical copy, so for smooth operations respective RM/ Dealer/ AP should get it from his/ her client on priority basis.
- 2. Proof (Nomination Form with ID Proof) for addition of Nominee is required to be sent by the client on email id accountopening1@elitestock.com.
- 3. The above documents are required to be sent from the designated email id of the client which the client has submitted at the time of filling the details in the online application for account opening, Activate Windows Go to Settino Message, use Win
- 4. The applicable Charges will be debited to the respective client ledger after opening of eKYC

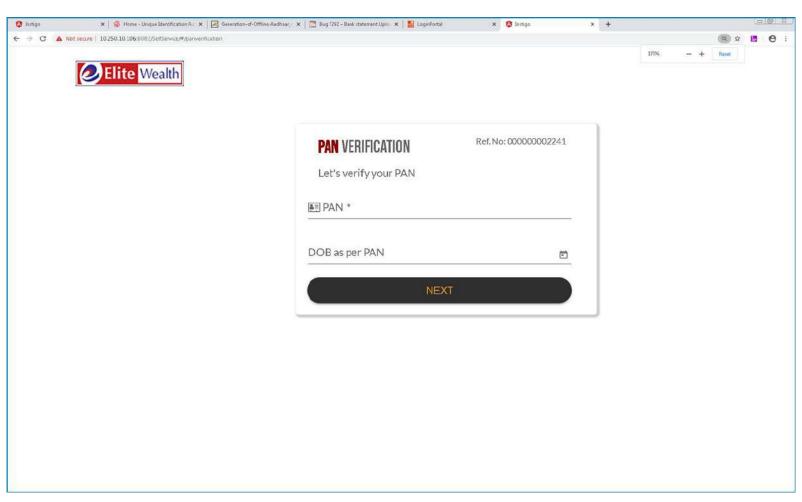
New Registration Page

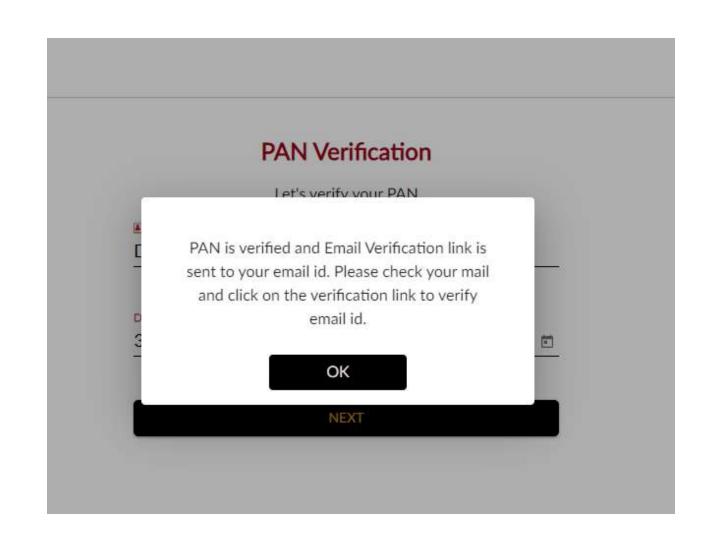


Client needs to register with email id and mobile no on new registration page :

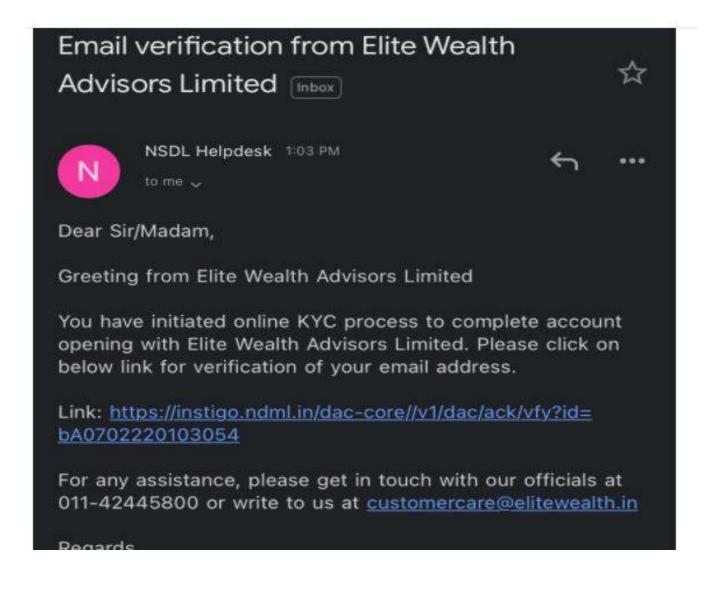


After successful verification of OTP client will move to PAN Verification page where we have integrated two services: 1) PAN verification with ITD 2) KYC status for Mentioned PAN





Check your email & verify your email id



Please select plan

Life Time Charges

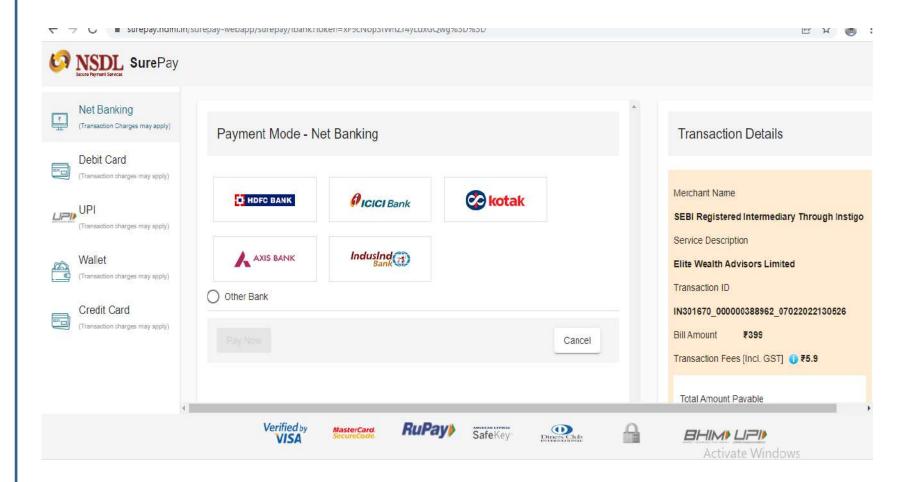
O Rs. 599

- Tariff structure - DP

- Tariff structure - Stock broker

PAY NOW

Mode of Payment screen with transaction details



Transaction ID will get generate towards payment of upfront fees:

Your payment has been done successfully

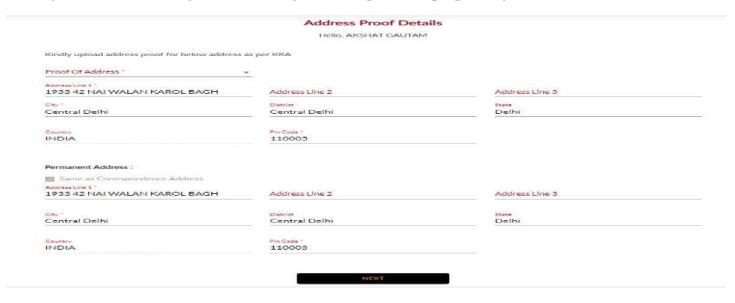
Transaction Id. IN301670_000000388962_07022022130526

PROCEED

Note: If your KYC not done than you will get this page on your screen



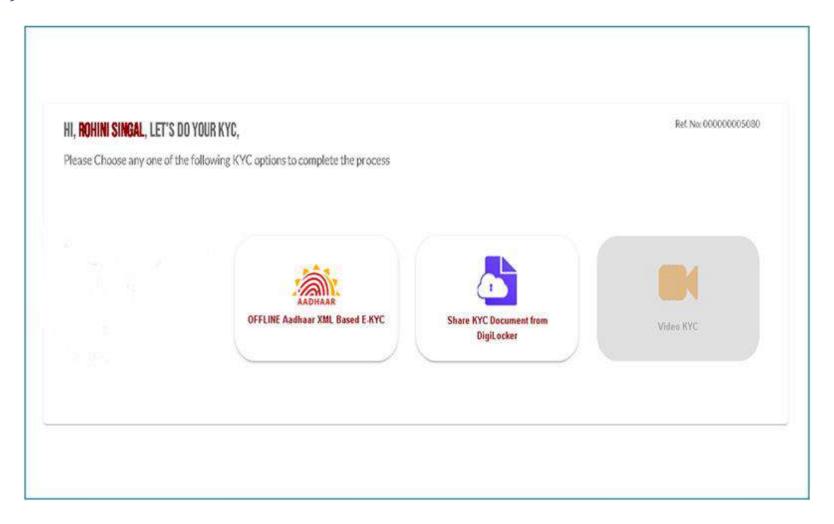
Note: If your KYC already done than you will get this page on your screen



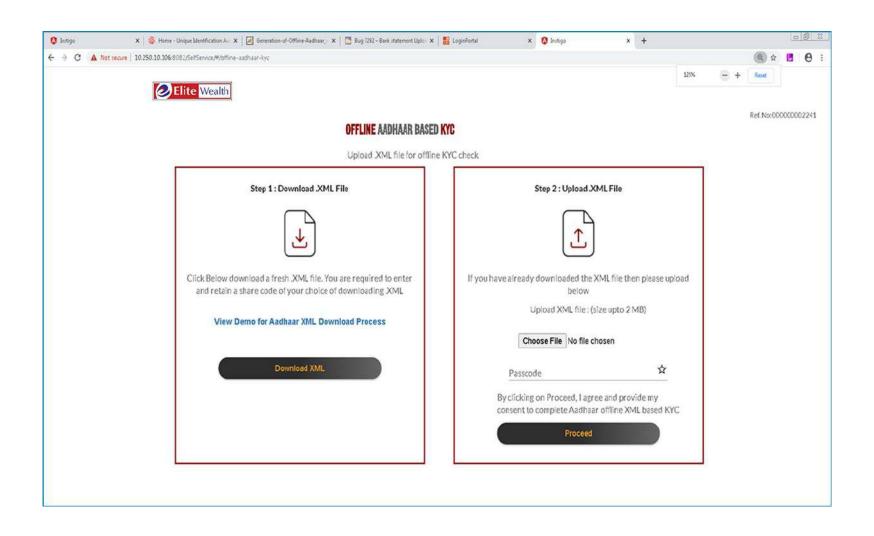
For Non KYC User

MODE OF KYC

- 1) Offline Aadhaar XML Based KYC
- 2) Digi locker
- 3) Video KYC



Offline Aadhaar XML Based KYC Download XML from Aadhaar and upload in instigo application



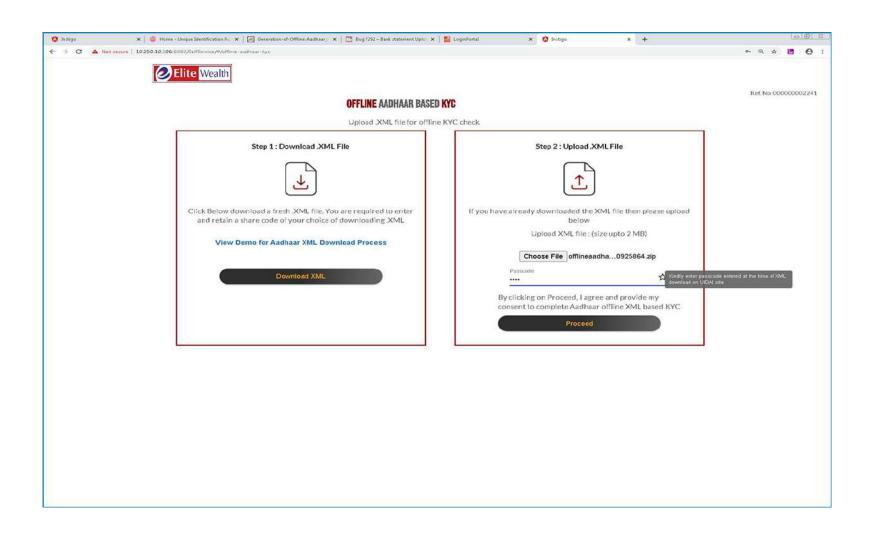
For Offline Aadhaar XML Based KYC – client Mobile number should be mapped with Aadhaar



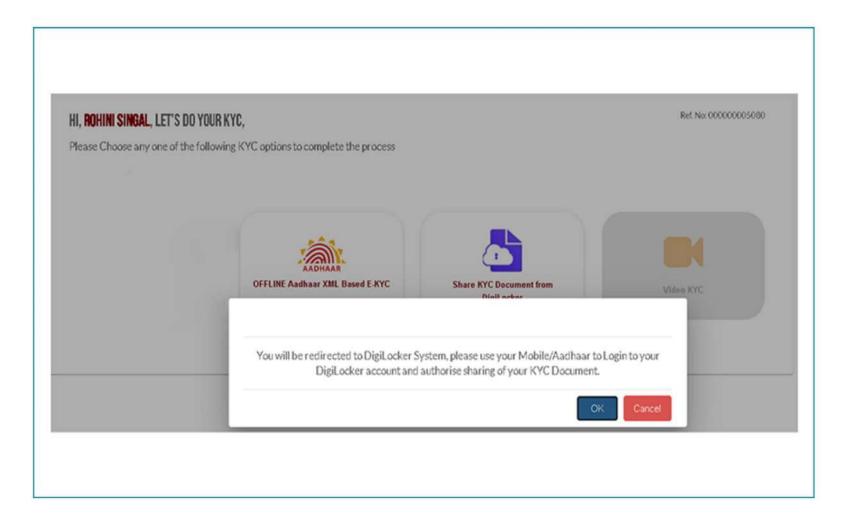
Generation of OTP page for Aadhaar XML based KYC

OTP sent to your Registered Mobile number. Check your mobile.	
Aadhaar Paperless Offline e-KYC	
Aadhaar Paperless Offline e-KYC is a secure and shareable documer holder for offline verification of identification.	nt which can be used by any Aadhaar
After entering Aadhaar/VID, create a Share Code of 4-characters. A Paperless Offline eKYC will be password protected using the same into the Resident's device/desktop.	
To avail the service the resident will have to share the ZIP file, the S with the service provider.	hare Code and registered mobile number
Enter your 12 digit Aadhaar number or 16 digit Virtual ID	to begin.
Aadhaar Number Virtual ID	
Aadhaar Number * •	± 100
12 Digit UID (1234/1234/1234)	
5 2 7 7 7 2 6 4 4 7 5 9	
Send OTP Or Enter TOTP	
Create a Share Code for your Paperless Offline eKYC * •	
Create a Share Code of 4 Characters to secure your Paperless Offline eICYC. It remember this Share Code as it will be required to unlock the ZIP file.	is important for Aadhaar Number holder to
Enter OTP / TOTP * •	
Please enter 6 digit OTP or 8 digit TOTP.	
₹ Download	

Upload XML

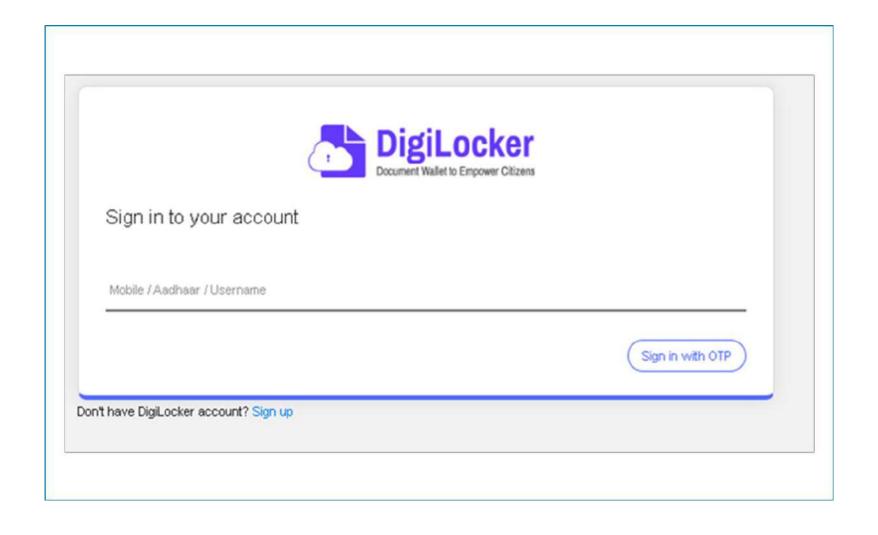


2) Digi locker Flow

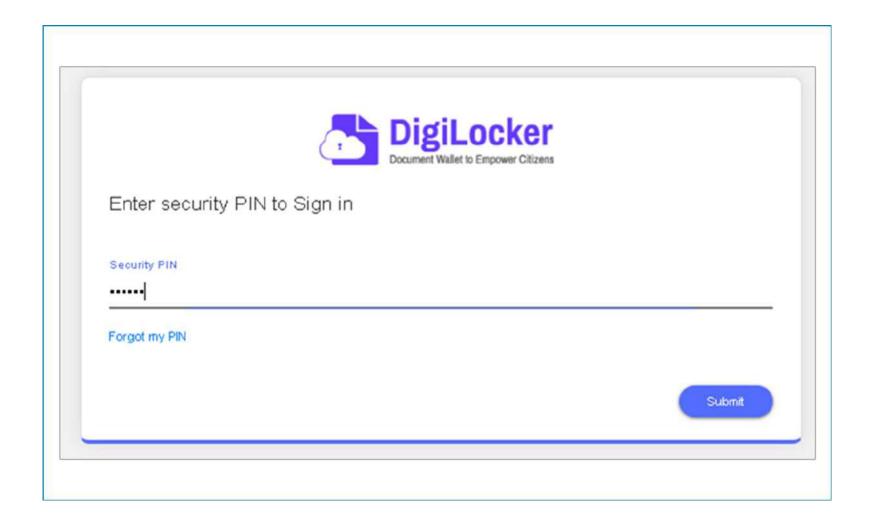


2) Digi locker Flow

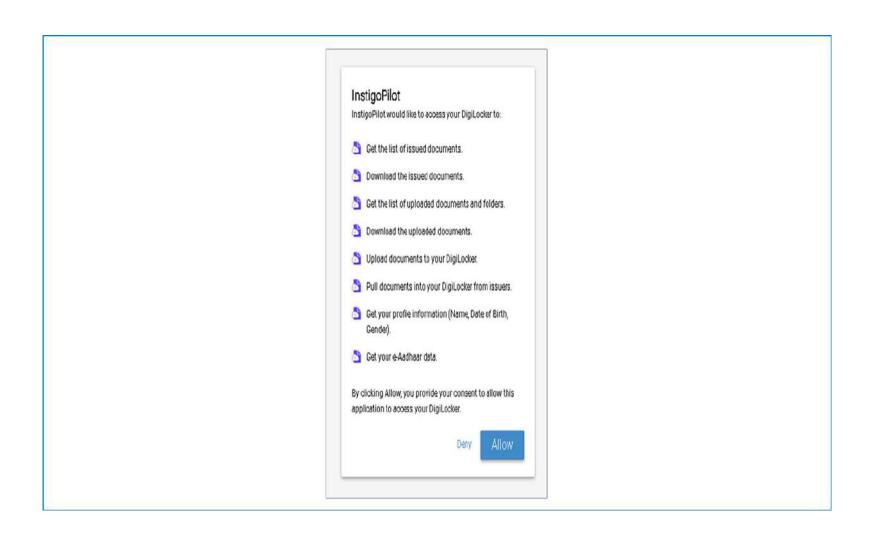
Enter mobile no / Aadhaar / User name available with Digi Locker.



Enter Security Pin for Digi Locker Account

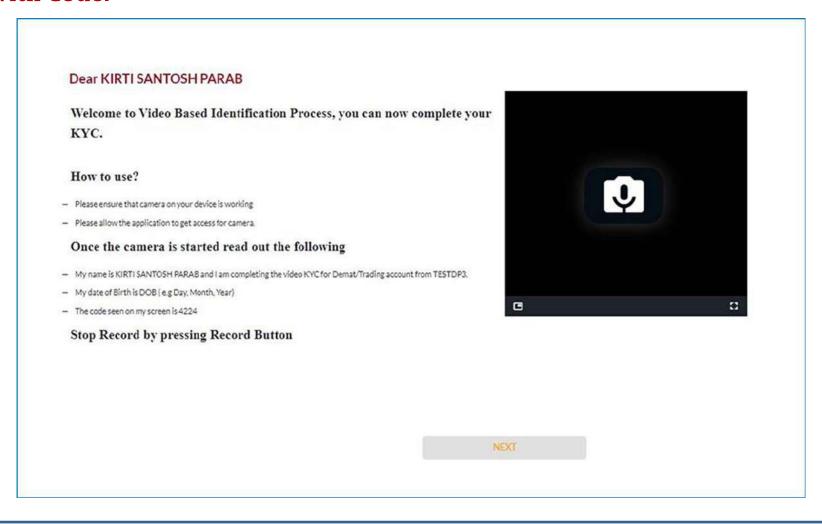


Consent for accessing your Digi locker account



3) Video KYC Flow

If mobile is not linked with Aadhaar or the Digi locker then client can opt for Video KYC, He needs to record video with the help of recorder provided on screen and needs to read out details available on screen with Code.



Address proof Details

Elite Wealth				Ref. No: 000000025481
		Address Proof Details		
		Helio, KIRTI SANTOSH PARAB		
	General Male			
	Correspondence Address:			
	Assessible 1" ABC	Address Line 2	Address Line 3	
	~~	- Assessment	ASSESS CITE S	_
	City*	District	State*	*
	INDIA	Fin Code*	Proof Of Address*	•
	(1 	4		
	Permanent Address			
	Same as Correspondence Address			
		*	V2/	
	Address Line 1*	Address Line 2	Address Line 2	— <u></u>
	City*	District	State *	
	Country			
	INDIA	Pin Code*	Proof Of Address*	
		NOC		

KRA Registration details:

Additional KRA Details Name as per Application: AKSHAT GAUTAM Name sequence is incorrect? ■ Nationality Residential Status Marital status * Gender.* Single Resident Individual Male India Father's/Spouse Name: Select Name * Select Title * First Name * HARSHWARDHAN Middle Name ≗ Surname Mobile No provided belongs to me or my family (Spouse/depedent children/Dependent parent) Self Father Mother Daughter Spouse Email ID provided belongs to me or my family (Spouse/depedent children/Dependent parent) Self Father Mother () Son Daughter Spouse PROCEED

Hi, AKSHAT GAUTAM

Let's capture Demat details.

SMS Alert Facility	YES	○ NO
Standing Instruction (SI)- To receive credit automatically into my account	YES	○ NO
Auto Pledge Confirmation	YES	○ NO
Mode of receiving Rights and Obligation Document	Electronic	O Physical
Mode of receiving Annual Reports, AGM notice and other communication from issuer	Electronic	O Physical
I wish to receive DIS booklet at the time of account opening	YES	○ NO
Mode of receiving account statement	Electronic	O Physical
Account to be operated through Power of Attorney (POA)	(a) YES	○ NO

Basic Services Demat Account

Online access to demat account

() YES

NO

HI AKSHAT GAUTAM,

Let's capture your personal details and financial details required for CKYC, PMLA and FATCA compliance

Country of Birth India	÷	KYC Identification Number	ber	Occupation *	*
₹ Gross Annual Income *		₹ Networth as on date		Place of Birth *	
Years at Current city					
Political Exposed Person (PEP)* * Not a PEP		(*)	ls your country	of tax residency other than India?	
Mother's Name:					
Select Title					
Mrs, •	♠ First Na	me *	† Middle Name	& Surname	
Office Contact Detail:					
Office Tel. No	Extn. No		FAXNo		

Client Bank Details With NPCI - Penny drop service

Let's capture your Bank Details You will receive all future pay-out of fund in this bank account with respect to these accounts. Bank Account Type * Savings IFSC Code * Account Number * Re-enter Account Number *

Client Bank Details With Matching Status

engraph to the engage of the e		2004/08
You will receive a	all future pay-out of fund in this bank account with respect to these accou	ints.
Bank Account Type * Savings	### HDFC0000439	
Bank Name HDFC BANK	Bank Branch NEW DELHI - KAROL BAGH	
Bank Address		
Marca Ira		
Account Number *	Re-enter Account Number *	
	VERIFY	
	Name as per bank	

Segment Details

Segment Details Let's capture Trading Segment Details BSE ☐ Equity ☐ Equity Derivatives ☐ Commodity ☐ Mutual Fund ☐ Currency Derivatives NSE ☐ Equity ☐ Equity Derivatives ☐ Commodity ☐ Mutual Fund ☐ Currency Derivatives MSE Equity Equity Derivatives Mutual Fund Currency Derivatives Commodity MCX Commodity Equity Equity Derivatives Mutual Fund Currency Derivatives NCDEX Commodity Equity Equity Derivatives Mutual Fund Currency Derivatives **ICEX** Commodity Mutual Fund Currency Derivatives Equity Equity Derivatives What is your Trading Experience? Select Experience * Past Action By regulatory/statutory/other authority? I wish to use my existing Demat Account NEXT

Activate Windows

Document Upload Page









Nomination

- O I wish to make nomination.
- (a) I do not wish to make nomination.

Nominee Details

HI, AKSHAT GAUTAM

Let's capture nominee details

Nominee Name (As per PAN/KYC/Aadhar) *		Share of each nominee Equal		Share of each nominee 100	%
Please enter nominee name					
Relationship with the applicant " Mother	÷	Mobile No. *		Email ID *	
			7/4		
Is Minor Yes No		Nominee Identification Details *	•		
Address of Nominee *				Pincode *	
			11		

Add Nominee

DECKER

Declarations

Ref. No: 000000388962

Hi AKSHAT GAUTAM, Please read the following Terms & Conditions and Declaration

For Demat Account
- I hereby request to open my demat account und
- I wish to enable standing instruction to receive .

- fer type resident ordinary in my name as per details provided herein above.
- ... Read more

For Trading Account

- I wish to receive contract notes, rights & obligation document, risk disclosure document and other Communication in electronic form.... Read more

General

- I/we hereby declare that the details furnished above are true and correct to the best of my/our knowledge and belief and I/we undertake to inform you of any changes therein, immediately. In case any of the above 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.... Read more

SRI Specific Declaration

Click here to download

Read Following Documents

- Rights & Obligation document of DP and Client
- Rights & Obligation document of stock broker and Client
- Risk Disclosure Document

- Tariff structure - DP

- Tariff structure - Stock broker

AGREE & PROCEED

Summary Details

Summary

	Name as per KRA/Aadhar/DigiLocker/Video KYC AKSHAT GAUTAM		Name as per Bank: AKSHAT GAUTAM	
	Gender Male		Date of Birth : 1999-06-30	
*	Nationality: India		Mobile Number: 8802691595	✓ Verified
*	Gross Annual Income: Btw Rs. 1 to Rs. 5 Lacs	•	Country of Birth: India	
	Mother's Name: Mrs. Kiran		Place of Birth : delhi	
	Residential Status : Resident Individual			
✓ Verified	Mobile no belongs to me or my family : Self		Email id belongs to me or my family : Self	
	*	Gender Male Nationality: India Gross Annual Income: Btw Rs. 1 to Rs. 5 Lacs Mother's Name: Mrs. Kiran Residential Status: Resident Individual Mobile no belongs to me or my family:	Gender Male Nationality: India Gross Annual Income: Btw Rs. 1 to Rs. 5 Lacs Mother's Name: Mrs. Kiran Residential Status: Resident Individual Mobile no belongs to me or my family:	Gender Date of Birth: Male 1999-06-30 Nationality: Mobile Number: India 8802691595 Gross Annual Income: Country of Birth: Btw Rs. 1 to Rs. 5 Lacs India Mother's Name: Place of Birth: Mrs. Kiran delhi Residential Status: Resident Individual Mobile no belongs to me or my family:

If Aadhaar is linked with mobile number then client can opt for eSign or

he can able to submit physical submit of document to DP address. He can able to download Application from Click here field

Let's sign your Application

eSign

- 1. You will be redirected to NSDL eGovernance Infrastructure Limited website for eSigning.
- 2. For eSign you need to complete eKYC using Aadhaar details.
- 3. Upon completion of eKYC, UIDAI will share your basic details such as name, address, date of birth, gender, etc.
- 4. Click here to view the application before eSign.

eSign with Aadhaar OTP

Is your Mobile not Linked with Aadhaar?

- 1. Download account opening form by clicking below
- 2. Print downloaded form and sign it
- 3. Send it to below address:

S-8, DDA Shopping Complex, Mayur Vihar, Phase - I, New Delhi - 110091

☐ I wish to submit the physical copy of application after affixing ink signature

Confirm & Download Application



NSDL Electronic Signature Service

ASP Name	NSDL DATABASE MANAGEMENT LIMITED
Transaction ID	000000388962_IN301670_1644220741384
Date & Time	2022-02-07T13:29:11

- ▼ I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -
- 1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of e-signing of documents for opening of demat/trading/MF subscription account/s, transfer of securities and closure of demat account held with Depository Participant of NSDL etc with SEBI registered intermediaries & Mutual Fund distributors associated for/with NSDL DATABASE MANAGEMENT LIMITED and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
- 2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of e-signing of documents for opening of demat/trading/MF subscription account/s, transfer of securities and closure of demat account held with Depository Participant of NSDL etc with SEBI registered intermediaries & Mutual Fund distributors associated for/with NSDL DATABASE MANAGEMENT LIMITED.
- 3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar:		Send OTP	Cancel

Click Here to generate Virtual ID.

Download Instructions to generate Virtual ID in lieu of Aadhaar.

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Generation of Application Ref Number stating successful completing of transaction to client.

Congratulations

Dear valuable Client.

Thank you for opening Demat/Trading account with us. Your Reference Number is **000000388962**. We request you to download the Power of Attorney and send the duly signed copies to the following address for registration and account activation:

Elite Wealth Ltd.

S-8,DDA Shopping Complex, Mayur Vihar-I, Delhi-110091,

Email Id: customercare@elitewealth.in,

Ph: 011-42445800

Power of Attorney Form

