



## **Step-by-Step Process for Opening an Online Demat and Trading Account**

### **Basic Information:**

#### **1. Enter a Valid Email ID:**

This will be used for validation and further communication.

#### **2. Enter Your Mobile Number:**

Preferably use an Aadhaar-linked mobile number.

#### **3. Mobile Number Verification:**

You will receive a 6-digit OTP on your mobile number.

Enter the OTP to proceed.

### **Optional Information:**

#### **4. Enter Our RM Code and Franchise Code (Optional):**

If you have any, please fill these in.

### **Required Documents:**

#### **5. Keep Handy:**

PAN Card Number and Date of Birth (DOB)

Aadhaar Number and Aadhaar-linked mobile number

Bank Account details (Account number and IFSC code)

### **Important Points for eKYC:**

#### **1. Power of Attorney (POA):**

POA must be obtained physically on stamp paper.

The original signed physical copy must be sent to us for POA activation.

RM/Dealer/AP should ensure this is prioritized for smooth operations.

**2. Nominee Addition:**

Send the Nomination Form along with ID proof to [DP@VISHWASFINCAP.COM](mailto:DP@VISHWASFINCAP.COM).

**3. Address Proof:**

There is no option to upload address proof online.

Until resolved, scan and email a copy of the Aadhaar card to [DP@VISHWASFINCAP.COM](mailto:DP@VISHWASFINCAP.COM).

**4. Document Submission:**

Documents must be sent from the email ID provided during the online application.

**5. Charges:**

Applicable charges will be debited from the client's ledger post eKYC opening.

**Documents Required (Scanned Copies):**

**Photograph:** Online click through eKYC

**Signature:** On plain paper

**PAN Card**

**Aadhaar Card:** (Mobile number must be mapped with Aadhaar)

**Cancelled Cheque**