



WEALTH FIRST PORTFOLIO MANAGERS LTD.

1. GO TO BELOW LINK

[HTTPS://LD.WEALTH-FIRSTONLINE.COM:446/LDCLIENTLEVELH/FRESHKYC.HTML](https://ld.wealth-firstonline.com:446/LDCLIENTLEVELH/FRESHKYC.HTML)

- ENTER NAME, MOBILE NUMBER, EMAIL ID AND PRESS TAB BUTTON
- ENTER OTP RECEIVED ON MAIL AND MOBILE NUMBER
- CLICK ON OPEN ACCOUNT

**OPEN ACCOUNT**

Name

Mobile Number

Email

Location

Once you enter all details OTP would automatically come on Email and Mobile

Enter OTP send on Mobile  Enter OTP send on E-mail

periences and ways of thinking.



- KYC CHECK

- ENTER DETAILS (USE TAB BUTTON TO NAVIGATE)

Steps to Open Account
Form Code FRM00 [REDACTED]

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

### KYC Check Save

Date Of Birth

PAN Number

Mobile Number

Email

Mobile Family

Email Family

Are you a U.S citizen?  Yes  No

Terms and Conditions

I hereby give my consent to use my Aadhar / Virtual ID details (as applicable) for the purpose of e-Signing my account opening form.

- By submitting my PAN, I authorize WEALTH FIRST PORTFOLIO MANAGERS LTD to fetch my data from KYC Registration Agency.
- Currently this process is applicable only for opening individual trading account and single holder Demat accounts for resident individuals. Soon we shall allow for NRIs and multiple holders in Demat account.
- Please note that by submitting the above mentioned details, you are authorizing us to Call/SMS you even though you may be registered under DNC. We shall Call/SMS you for a period of 12 months.

04:53 minutes
Next →

? Help

KYC Check:

- Input:**
  - Insert Date of Birth.
  - Insert PAN Number
  - Mobile Family : Please select appropriate relationship from dropdown
  - Email Family : Please select appropriate relationship from dropdown
- Help:**
  - If already registered on CVL / NDML : Your Name, Address and other details would be fetched and available on Profile Creation page for verification
  - If not registered on CVL / NDML : 1] Please put your Aadhar number, Data would be fetched from Digi locker and populated on Profile creation page for verification. 2] You will receive OTP on Aadhar Registered Mobile for Authentication.
  - If neither registered on CVL / NDML or Aadhar- You can put details manually and proceed

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



PROFILE CREATION

Id.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation**
- Bank and Income Details
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

### Profile Creation

Save

Address Proof Code  
Aadhaar

Address Proof ID  
[Redacted]

Title  
M/s

Client Name  
[Redacted] [Redacted] [Redacted]

Name as per PAN  
[Redacted]

Relation Type  
Spouse

Title  
Mr

Spouse/Father Name  
[Redacted]

Mother Full Name  
[Redacted]

01:59 minutes

Previous Next

#### Help

##### Profile Creation:

- Data fetched from CVL / NDML or Aadhar would be displayed. Please verify the same and fill in requisite information on blank data fields
- If data not fetched from CVL / NDML or Aadhar – Please put details manually

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



Id.wealth-firstonline.com:446/LDCClientLevelH/FreshKyc.html

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation**
- Bank and Income Details
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

Mother Full Name  
[Redacted]

Gender  
FEMALE

Marital status  
Married

Nationality  
INDIAN

Other Nationality  
[Redacted]

Occupation  
Business

Other Occupation  
[Redacted]

Residence Contact Number  
[Redacted]

Residence Status  
Resident Individual

Residence/Correspondence Address  
[Redacted]

Help

**Profile Creation:**

- Data fetched from CVL / NDML or Aadhar would be displayed. Please verify the same and fill in requisite information on blank data fields
- If data not fetched from CVL / NDML or Aadhar – Please put details manually

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz

← Previous 00:55 seconds Next →



Browser tabs: wealthfirst login, YouTube, nas storage, Sign in to Microsoft A..., EPBX login, Attendance NET, TechExcel Software, Attendance Local, https://ld.wealth-first..., FREE Gujarati to Engli..., Index of /common/N..., Imported From IE, grandstream login

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
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Click on above sections to navigate through your form (if already filled).

079402400

Residence Status

Resident Individual

Residence/Correspondence Address

Address 1

VATVA

Address 2

VATVA

Address 3

VATVA

Country

INDIA

State

GUJARAT

City

AHMEDABAD

Pincode

380000

Proof Issue Date

← Previous

00:13 seconds

Next →

Help

Profile Creation:

- Data fetched from CVL / NDML or Aadhar would be displayed. Please verify the same and fill in requisite information on blank data fields
- If data not fetched from CVL / NDML or Aadhar – Please put details manually

Contact Number:079-40240019/68  
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Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation**
- Bank and Income Details
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

Proof Expiry Date: 01/01/1970

Same As Correspondence Address

**Permanent Address**

Address 1: VATVA

Address 2: VATVA

Address 3: VATVA

Country: INDIA

State: GUJARAT

City: AHMEDABAD

Pincode: 380000

Address Proof Code

Navigation: Previous | 00:01 seconds | Next

**Help**

**Profile Creation:**

- Data fetched from CVL / NDML or Aadhar would be displayed. Please verify the same and fill in requisite information on blank data fields
- If data not fetched from CVL / NDML or Aadhar – Please put details manually

Contact Number: 079-40240019/68  
Email ID: contact@wealthfirst.biz



BANK AND INCOME DETAILS

- ENTER IFSC CODE AND BANK ACCOUNT NUMBER

Id.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html

Steps to Open Account | Form Code FRM00152

KYC Check

Profile Creation

**Bank and Income Details**

Trading Segment

Nominee Details

Document Upload

Click on above sections to navigate through your form (if already filled).

### Bank and Income Details

IFSC Code

MICR Code

Bank Name: KOTAK MAHINDRA BANK LTD

Branch Name: AHMADAB

Bank Account Type: Savings

Name on Cheque

Bank Account number

Re Enter Bank Account number

Income Details

Save

Help

**Bank and Income Details:**

- Input:**
  - IFSC Code of your Bank Account
  - Bank Account number
  - Select Annual Income from Drop down or Alternatively put Networth figure and select date
  - Other Details : Please select appropriate information from drop down
- Help:**
  - Bank details would be verified by crediting Rs. 1
  - Income or Networth Should not be older than 12 months

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz

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ENTER INCOME DETAILS

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

\*\*\*\*\*

Re Enter Bank Account number

\*\*\*\*\*

Income Details

Annual Income

BELOW 1 LAC

Net worth Details

70000

Income / Net worth Date

05/11/2022

Correspondence Address Type

Resident/Business

Permanent Address Type

Resident/Business

Declaration Date

05/11/2022

Declaration Place

AHMEDABAD

Other Details

← Previous
00:01 seconds
Next →

? Help

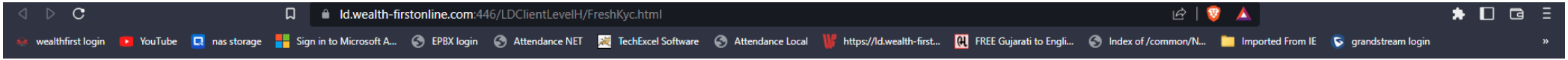
Bank and Income Details:

- Input:**
- IFSC Code of your Bank Account
- Bank Account number
- Select Annual Income from Drop down or Alternatively put Networth figure and select date
- Other Details : Please select appropriate information from drop down
- Help:**
- Bank details would be verified by crediting Rs. 1
- Income or Networth Should not be older than 12 months

Contact Number:079-40240019/68

Email ID:contact@wealthfirst.biz





Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
- Bank and Income Details**
- Trading Segment
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

AHMEDABAD

**Other Details**

Documents Sub. Proof

True Copies of Documents Received

GST number (enter, if provided)

Political connected

Not Applicable

Education

High School

Authorization Type

Quarterly

**Prior Experience Details**

Prior Experience

No

Years of experience

Years in other Investment Related Fields

0

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**Help**

**Bank and Income Details:**

- Input:**
  - IFSC Code of your Bank Account
  - Bank Account number
  - Select Annual Income from Drop down or Alternatively put Networth figure and select date
  - Other Details : Please select appropriate information from drop down
- Help:**
  - Bank details would be verified by crediting Rs. 1
  - Income or Networth Should not be older than 12 months

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



- TRADING SEGMENT
- SELECT SEGMENT

← → ↻ [ld.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html](https://ld.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html) 📍 📄 ☆ ⬇️ 📱

Steps to Open Account | Form Code FRM00343

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment**
- Nominee Details
- Document Upload

Click on above sections to navigate through your form (if already filled).

## Trading Segment

Save

### Segment Type

- Equity
- Mutual Fund

### Existing DP Details

Do you want to Open same Account in DP?

Yes

Select DP

CDSL

POA / DDPI Flag

No

Brokerage Scheme

TEST

← Previous

04:47 minutes

Next →

Help

### Trading & Product Plan:

- **Input:**
  - Select segment
  - Insert existing DP Details
- **Help:**
  - Equity : Account would be activated in b NSE and BSE
  - Derivatives : Derivate, if selected, will be activated in NSE

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



NOMINEE DETAILS

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment
- Nominee Details**
- Document Upload

Click on above sections to navigate through your form (if already filled).

### Nominee Details

Nominee Opt

Nominee-1 | Nominee-2 | Nominee-3

Save

Prefix: Mr

Name: [Redacted]

Address Line 1: [Redacted]

Address Line 2: [Redacted]

Address Line 3: [Redacted]

Country: INDIA

State: GUJARAT

City: AHMEDBAD

Save

Help

#### Nominee Details:

- Not mandatory for only trading Account opening and can be skipped

Contact Number: 079-40240019/68  
Email ID: contact@wealthfirst.biz

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Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment
- Nominee Details**
- Document Upload

Click on above sections to navigate through your form (if already filled).

Address Line 1  
[REDACTED]

Address Line 2  
[REDACTED]

Address Line 3  
[REDACTED]

Country  
INDIA

State  
GUJARAT

City  
AHMEDBAD

Pin Code  
[REDACTED]

PAN Number  
[REDACTED]

Date of Birth  
[REDACTED]

Minor

Set Up Date  
05/11/2022

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**Help**

**Nominee Details:**

- Not mandatory for only trading Account opening and can be skipped

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



### UPLOAD NOMINEE PAN

Id.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html

wealthfirst login YouTube nas storage Sign in to Microsoft A... EPBX login Attendance NET TechExcel Software Attendance Local https://Id.wealth-first... FREE Gujarati to Engli... Index of /common/N... Imported From IE grandstream login

Steps to Open Account | Form Code FRM00152

- KYC Check
- Profile Creation
- Bank and Income Details
- Trading Segment
- Nominee Details**
- Document Upload

Click on above sections to navigate through your form (if already filled).

Email Id: [Redacted]

Relationship: Spouse

Residual Flag: Yes

UID: [Redacted]

VID: 0

% of Shares: 100

Nominee Proof: Photograph and Signature

Choose Files No file chosen

00:01 seconds

Previous Next

**Help**

**Nominee Details:**

- Not mandatory for only trading Account opening and can be skipped

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz



DOC UPLOAD

UPLOAD LIVE PHOTO (SELFIE) ONLY [PASSPORT SIZE PHOTO IS NOT VALID]

Steps to  
Open Account

KYC Check

Profile Creation

Bank and Income Details

Trading Segment

Nominee Details

Document Upload

Click on above sections to navigate through your form (if already filled).

Form Code  
FRM00152

### Document Upload Save

PAN Card	Upload <span style="color: green;">✔</span>
Photo	Upload <span style="color: green;">✔</span>
Correspondence Address Proof	Upload <span style="color: green;">✔</span>
Income Proof	Upload <span style="color: green;">✔</span>
Cancelled Cheque	Upload <span style="color: green;">✔</span>
Specimen Signature	Upload <span style="color: green;">✔</span>

PAN Card

Photo

Address Proof

Income Proof

Cancelled Cheque

Signature

signature

Demat Proof

Not Uploaded

← Previous
00:01 seconds
Next →

**Help**

**Document Upload:**

- If Data is fetched from CVL / NDSL then upload :
- PAN Card
- Photo or it can be clicked from web cam
- Address Proof
- Income Proof (Only if Account to be activated in Derivatives)
- Bank Proof - Cheque copy
- Specimen signature
- Demat Account proof
- If Data is fetched from Aadhar : Aadhar and Photo would be fetched from Digilocker, upload rest of the documents.
- Note : All documents should be self certified.

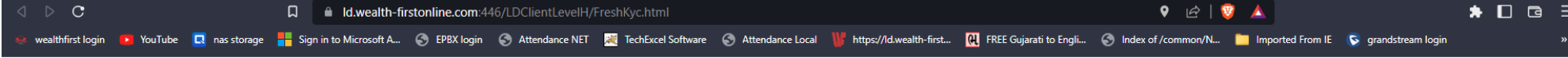
**Next Steps**

- If Data is fetched from CVL / NDSL then In person verification need to be done.
- A new page would be opened and you will receive OTP on your mobile number. Please write it on piece of paper and display in front of camera without covering the face. Face should be clearly visible. This is to be recorded for minimum 20 seconds
- Summary page would be displayed post IPV for validation.
- Post validation, you will receive OTP
- Form would be generated for final review and E Sign
- Click on ESign tab, It will connect to Aadhar for ESign
- Put OTP and proceed
- A final signed copy of form with supporting documents would be available on screen which you can save for records
- Data would be sent for further processing and you will be informed via EMAIL once account is activated

**Contact Number:079-40240019/68**  
**Email ID:contact@wealthfirst.biz**




DATA CONFIRMATION



Confirmation

**Profile Information**



Name : [REDACTED]  
 Date of Birth : [REDACTED]  
 PAN Number : [REDACTED]  
 Email id : [REDACTED]  
 Mobile number : [REDACTED]

**KYC Check**

Date of Birth : [REDACTED]  
 PAN number : [REDACTED]  
 Mobile number : [REDACTED]  
 Email id : [REDACTED]  
 Are you a U.S. citizen? : No

**Check Status**

Check	Verification	Verified from
Date of Birth	No	
Pan number	No	
Address	No	
Mobile number	Yes	OTP
Email	Yes	OTP

**Profile Creation**

Applicant name prefix : M/s  
 Name : [REDACTED]  
 Name as per PAN : [REDACTED]  
 Relation type : Spouse  
 Father/Spouse Name Prefix : Mr  
 Father name : [REDACTED]  
 Mother Full Name : [REDACTED]  
 Gender : FEMALE  
 Marital Status : Married  
 Nationality : Indian  
 Occupation : Business  
 Residence Contact number : 079402400  
 Residential Status : Resident Individual  
 Address line 1 : LAMBHA  
 Address line 2 : VATVA  
 Address line 3 : CANAL ROAD  
 City : AHMEDABAD

**Form Status**

KYC Check	✓
Profile Creation	✓
Bank and Income Details	✓



DOCUMENT VERIFICATION

Browser address bar: ld.wealth-firstonline.com:446/LDClientLevelH/FreshKyc.html  
Browser tabs: wealthfirst login, YouTube, nas storage, Sign in to Microsoft A..., EPBX login, Attendance NET, TechExcel Software, Attendance Local, https://ld.wealth-first..., FREE Gujarati to Engli..., Index of /common/N..., Imported From IE, grandstream login

Confirmation

<p>Income Proof</p>	<p>Cancelled Cheque</p>	<p>Specimen Signature</p> <p>signature</p> <p>Latitude:23.0276 Longitude:72.5871 05/11/2022 11:45 AM</p>
<p>Nominee 1 Proof</p>		

Data Validated. Please proceed to complete.

Proceed





IPV OTP PROCESS

CLICK ON SEND OTP

Steps to Open Account | Form Code FRM00152

**IPV over webcam**

### WebCam IPV

**Step 1**

Clients are requested to show their face while showing OTP. Video will automatically get stop after 11 seconds. Do not press STOP button before that

[Send OTP](#)

Document Upload:

- If Data is fetched from CVL / NDSL then upload :
  - PAN Card
  - Photo or it can be clicked from web cam
  - Address Proof
  - Income Proof (Only if Account to be activated in Derivatives)
  - Bank Proof - Cheque copy
  - Specimen signature
  - Demat Account proof
- If Data is fetched from Aadhar : Aadhar and Photo would be fetched from Digilocker, upload rest of the documents.
- Note : All documents should be self certified.
- Next Steps**
  - If Data is fetched from CVL / NDSL then In person verification need to be done.
  - A new page would be opened and you will receive OTP on your mobile number. Please write it on piece of paper and display in front of camera without covering the face. Face should be clearly visible. This is to be recorded for minimum 20 seconds
  - Summary page would be displayed post IPV for validation.
  - Post validation, you will receive OTP
  - Form would be generated for final review and E Sign
  - Click on ESign tab, It will connect to Aadhar for ESign
  - Put OTP and proceed
  - A final signed copy of form with supporting documents would be available on screen which you can save for records
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Contact Number: 079-40240019/68  
Email ID: contact@wealthfirst.biz



WRITE OTP ON PAPER AND SHOW IT TO CAMERA

CLICK ON SAVE

The screenshot displays the 'WebCam IPV' interface. On the left, a navigation menu lists steps: KYC Check, Profile Creation, Bank and Income Details, Trading Segment, and Nominee Details. The 'Document Upload' section is highlighted. Below the menu, a note says 'Click on above sections to navigate through your form (if already filled)'. The main area features a video player with a play button and a 'Save' button. The video shows a hand holding a paper with the handwritten OTP '68982'. A progress bar below the video shows '00:01 seconds'. A 'Back' button is on the left, and 'Start' and 'Stop' buttons are at the bottom. A notification at the top reads 'Id.wealth-firstonline.com:446 says Video Save Successfully'. The right sidebar contains a 'Help' section titled 'Document Upload:' with instructions on document requirements and next steps. At the bottom right, contact information is provided: 'Contact Number:079-40240019/68' and 'Email ID:contact@wealthfirst.biz'.



Steps to Open Account | Form Code FRM00152

Document Upload

PAN Card [Upload] ✓

Photo [Upload] ✓

Corres

Incom

Cance

Speci

Not Uploaded

← Previous | 00:01 seconds | Next →

Save

Help

Document Upload:

- If Data is fetched from CVL / NDSL then upload :
  - PAN Card
  - Photo or it can be clicked from web cam
  - Address Proof
  - Income Proof (Only if Account to be activated in Derivatives)
  - Bank Proof - Cheque copy
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  - Data would be sent for further processing and you will be informed via EMAIL once account is activated

Click on above sections to navigate through your form (if already filled).

Email Send successfully....

**THANK YOU!!!**

Thank you for your opening a demat/trading account with us.

Request you to **check your registered email** for completing the verification process.

OK

Contact Number:079-40240019/68  
Email ID:contact@wealthfirst.biz