Online Account Opening Steps

WEALTH FIRST
PORTFOLIO MANAGERS LIMITED
Simple process. Expert wealth

eKYC **Online Registration**

Open a trading and Demat account online.

Happy Investing

Signup Now
Or resume/track your existing application

Enter Your Mobile Number *

Select Dependency *
--Select--

Submit

Make sure to accept before

Please accept the Terms & Conditions

In case the Number entered is associated with Existing Account Please mention the Relation with the person it is associated

Note:
*Online account opening requires your number to be linked with Aadhaar. You can check if your mobile number is linked to Aadhaar here. If your mobile number isn't linked to Aadhaar, please open your account offline.

*Keep the photocopies of the following documents handy to complete account opening process seamlessly.

| 1. PAN | 2. Bank Proof (Cancelled cheque/ Passbook Front Page) | 3. Signature (Should match the one on PAN) | 4. Income Proof (Bank Statement/ Demat Holdings Statement/ Income Tax Return) | 5. Copy of Self Photograph | 6. Copy of Aadhaar | 7. Nominee Proof (PAN/Aadhaar/Voter Id/Driving Licence/Passport) |

Email-Id Verification

VERIFICATION CODE

ENTER

1	2	3
4	5	6
7	8	9
	0	

For Email Verification, Either the existing Google Acc. can be used or a separate Email ID can be added.

Email Address

G   Continue with Google

———— OR ————

Enter Your Email *
Enter Your Email

Branch Reference Code *

Enter the Word HON as reference Code

* If you are not aware on Branch Code, Please type **"HON"**

☐ Please accept the Terms & Conditions

Please ACCEPT Before moving

Next

*Keep the photocopies of the following documents handy to complete account opening process seamlessly.

1. PAN   2. Bank Proof (Cancelled cheque/ Passbook Front Page)   3. Signature (Should match the one on PAN)   4. Income Proof (Bank Statement/ Demat Holdings Statement/ Income Tax Return)   5. Copy of Self Photograph   6. Copy of Aadhaar   7. Nominee Proof (PAN/Aadhaar/Voter Id/Driving Licence/Passport)

WEALTH FIRST
PORTFOLIO MANAGERS LIMITED
Simple process. Expert wealth

Choose your Segment

Select your trading preferences.

✓ NSE CASH   ✓ BSE CASH

✓ MF

View Equity Plan

Select Trading Preferences *
--Select--

Please select numbers of holders *
--Select--

Running Account Authorisation *
Quarterly

Next

Max. three holders can be selected

Keep Quarterly selected

Select if you want Only Demat, Only Trading or Both

WEALTH FIRST
PORTFOLIO MANAGERS LIMITED
Simple process. Expert wealth

PAN Verification

- Kindly input your PAN and Date of Birth exactly as indicated on your PAN Card.

- The Account Name will be recorded in accordance with the details provided in the Income Tax Database

- In compliance with the latest PMLA regulations, please verify that your Aadhar Number is correctly linked to your PAN.

Mandatory Fields

PAN

Your name will be taken as per ITD (Income Tax Department).

Enter Pan Number *

Enter Date of Birth *
dd-mm-yyyy

Submit

DigiLocker
Document Wallet to Empower Citizens

Sign up

It takes just a minute

Enter your Aadhaar Number

DigiLocker uses Aadhaar to enable authentic document access

Next

Try another way

DigiLocker
Document Wallet to Empower Citizens

Verify Aadhaar OTP

UIDAI has sent a temporary OTP to your mobile ending in *******2473(valid for 10 mins).

Please enter OTP to complete verification

| |
| |

Didn't receive OTP? Wait few minutes for the OTP to arrive. Do not refresh or close!

Submit

Didn't get the OTP? Resend OTP

OTP will be sent on the number that is associated with ADHAAR CARD if you have existing digilocker ID

Create your account using mobile

if you dont have existing account, "Click Here" to Create

DigiLocker
Document Wallet to Empower Citizens

You are already registered with DigiLocker

6 digit PIN provides extra security to your account with two factor authentication. Don't disclose your Security PIN to anyone.

Please enter your 6 digit Security PIN to Signin

Enter the 6 digit PIN created while opening account on Digilocker

Forgot my PIN

Done

![DigiLocker - Document Wallet to Empower Citizens]

Please provide your consent to share the following with **MEON:**

⌄ Issued Documents (7)   Select all ☑

Aadhaar Card (XX5920)   ☑

Degree Certificate (can be accessed)   ☐

Driving License (XX040509)   ☐

PAN Verification Record (XXR0230B)   ☑

... View all 7 documents

🗄 DigiLocker Drive   ☐

👤 Profile information
Name, Date of Birth, Gender

✉ Get your Email

👥 Get your care of person name

📍 Get your address

🪪 Get your profile picture

📅 Consent validity date (Today +30 days)
03-November-2024   Edit ✎

❓ Purpose
Know Your Customer   ⌄

Consent validity is subject to applicable laws.   By clicking 'Allow', you are giving consent to share with **MEON** .

[Deny]   [Allow]

Click "ALLOW" if all the information on this page is correct and authorized to be

Personal Details

Father's Name *

C/O Awdhesh Singh

Mother's Name *

[ ]

Gender *

--Select--

Marital Status *

--Select--

Education *

--Select--

Annual Income *

--Select--

Trading Experience *

[ ]

Politically Exposed *

No

Occupation *

--Select--

Net Worth (As Per Assessment year)

[ ]

Are You Citizen Of India ? *

Yes

Do you wish to execute DDPI ? Click here **to know what is DDPI** *

Yes

Demat account type *

BSDA Opted out

Whether you wish to receive Physical Contract Note or Electronic Contract Note (Specify - Physical/Electronic) *

Electronic Contract

Submit

It is compulsory to fill in all the details with ' * ' marked in order to open account

Nominee Details

It is very important to ADD Nominee Details

Add Nominee Details *

--Select--

✓ I/We hereby confirm that I/We do not wish to appoint any nominee(s) in my demat/trading account and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my/our legal heirs would need to submit all the requisite documents/information for claiming of assets held in my/our demat/trading account, which may also include documents issued by court or other such competent authority, based on the value of assets held in the demat/trading account.

Submit →

Nominee Details

Add Nominee Details *

Yes

Nominee1 Name *

Nominee1 Name

Nominee1 Email *

Nominee1 Email

Nominee1 Mobile *

Nominee1 Mobile

Nominee1 is your *

--Select--

Nominee1 DOB *

dd-mm-yyyy

☐ Same as my address

Nominee1 Address 1 *

M 81 Bishanpura Sector-58 Near Agarwal Sweet Noida Gautam Buddha Nagar Uttar Prad

Nominee1 address 2 *

Gautam Buddha Nagar

Nominee1 City *

Gautam Buddha Nagar

Nominee1 State *

Uttar Pradesh

Nominee1 Pincode *

201301

Nominee1 Country *

India

Nominee1 Percentage *

Nominee1 Percentage

Select Nominee one proof type *

--Select--

Upload Nominee one document

Upload*

It is compulsory to fill in all the details with ' * ' marked in order to open account

It is mandatory to fill in all the BANK DETAILS

Bank Details

IFSC *

MICR *

Account Number *

Confirm Account Number *

Bank Address

Account Type *
--Select--

Submit

Post this step, you will be redirected to uploading the PROOFS, and the format in which the documents that need to be uploaded is mentioned.

WEALTH FIRST
PORTFOLIO MANAGERS LIMITED

Simple process. Expert wealth

Upload Signature

Informed Consent

Sign here

Upload a photo of Signature or
Digital Signature

Upload Signature Proof

Please upload any of the documents asked below in order for us to verify
your signature

Upload Signature File must be in JPEG, PNG, or JPG format (max
size 5MB)

Upload*

OR

Digital Signature

next

Blink your eyes ! This brings liveliness of the photo.

Webcam Client Image
Instructions
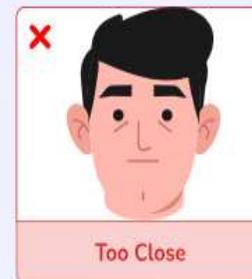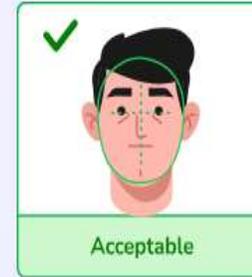
✓

Acceptable

✗

Facing Sideways

✗

Wearing Goggles

✗

Covering Face

✗

Too Close

✗

Too Far

Capture

the Demat file can be downloaded for reference

company_logo

WEALTH FIRST
PORTFOLIO MANAGERS LIMITED
Simple process. Expert wealth

D:\PD\Client-For... 1 / 85 — 44% +

INDEX OF DOCUMENTS
MANDATORY DOCUMENTS AS PRESCRIBED BY SEBI & EXCHANGES

S.N.	Name of the Document	Brief Significance of the Document	Pg. No
1.	Account Opening Form	A. KYC & CKYC form - Document captures the basic information about the constituent and an instruction/check list alongwith FATCA	1-15
		B. Document captures the additional information about the constituent relevant to trading account and an instruction/check list.	
2.	Rights and Obligations	Document stating the Rights & Obligations of stock broker/ trading member, sub-broker and client for trading on exchanges (including additional rights & obligations in case of internet/ wireless technology based trading).	16-20
3.	Risk Disclosure Document (RDD)	Document detailing risks associated with dealing in the securities market.	21-24
4.	Guidance Note	Document detailing do's and don'ts for trading on exchange, for the education of the investors.	25-26
5.	Policies and Procedures	Document describing significant policies and procedures of the stock broker.	27-30
6.	Tariff sheet	Document detailing the rate/amount of brokerage and other charges levied on the client for trading on the stock exchange(s).	31
	VOLUNTARY DOCUMENTS AS PROVIDED BY THE STOCK BROKER		
7.	Customer Profile	Additional detail about client	32
8.	Running Account Authorisation	To maintain fund, securities on running account basis	37
	DP SECTION		
9.	DP FORM	Document captures the additional information about the constituent relevant to DP account opening form, option form for DIS and nomination form.	42-46
10.	DDPI	This document authorises stock broker for pay-in & pay-out of securities	47-48
11.	SMS Alert	This contains term & conditions regarding SMS alert facility	51-52
12.	DP Charges	Document detailing the charges levied on the client of various categories.	54
13.	Most Important Terms and Conditions	Important Terms and Conditions as specified by SEBI	68
14.	Acknowledgement of receipt	Acknowledgement of receipt of all mandatory and voluntary documents by the client.	68

Cancel

Proceed to e-sign ➜

Check the data and Click Proceed

protean

Meon Technologies Private Limited has requested to Digitally sign the document
Transaction ID: UKC:eSign:5848:20241004121655140 dated 2024-10-04T12:16:01

[Select Langu ∨] [Play audio] [Stop audio]

Please click on the checkbox and enter Aadhaar/Virtual ID

☑ I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to -

1. Use my Aadhaar / Virtual ID details (as applicable) **Digital Signing of Documents for On-boarding and Agreement purposes** for/with **Meon Technologies Private 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) **Digital Signing of Documents for On-boarding and Agreement purposes** for/with **Meon Technologies Private Limited** .

3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines to time.

VID/Aadhaar: [Enter VID/Aadhaar] 👁

Enter Adhaar Number and once Sent OTP, It will automatically be APPROVED and further processed.

[SEND OTP] [CANCEL]

NSDL e-Gov is now **protean**

Click Here to generate Virtual ID. Download Instructions to generate Virtual ID in lieu of Aadhaar.

Copyright © 2021 | Protean eGov Technologies Limited