

CLIENT REGISTRATION KIT FOR INDIVIDUALS

NAME OF THE CLIENT																											
LOCATION																											
UNIQUE CLIENT CODE																											
DP ID & CLIENT ID																											
CKYC/KRA Registered	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Ref. No.																								
KIT NO	G109																										
SERIAL NO																											
DATE																											
EMPLOYEE NAME																											
EMPLOYEE CODE																											

**PLEASE INDICATE THE PURPOSE OF COLLECTING
THIS BOOKLET BY PUTTING A TICK MARK IN THE APPROPRIATE BOX.**

- ☐ New Account (Trading/Demat)
- ☐ New Demat A/C with Trading A/C updation
- ☐ New Demat A/C with DDPI Activation
- ☐ New Demat A/C with Trade code Transfer

ACCOUNT OPENING KIT

INDEX

S.No.	Name of the Document	Brief Significance of the Document	Page No
MANDATORY DOCUMENTS AS PRESCRIBED BY SEBI & EXCHANGES			
1	Account Opening Form	A. (a) CKYC Instruction and Check list for individual	03-04
		(b) CKYC form- Document captures the basic information about the constituent	05-08
		(c) KRA KYC form- Document captures the basic information about the constituent-NonIndividual	09
		(d) KRA KYC form Instruction and Check list for Non Individual	10
		(e) Details of Promoters/Partners/Karta/Trustees and Whole time directors and Ultimate Beneficial Owner (natural person) Forming A part of KYC for Non Individual	11-12
		B. (a) Additional information about the constituent relevant to trading Account	13-20
		(b) Instruction and Check list	21
2	Tariff Sheet	Document detailing the rate/amount of brokerage and other charges levied on the client for trading on the stock exchange(s)	22
3	Rights and Obligations of Stock Brokers, Sub-brokers and Clients	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)	52-59
4	Risk Disclosure Document (RDD)	Document detailing risks associated with dealing in the securities market.	60-64
5	Guidance Note of the investors	Document detailing do's and don'ts for trading on exchange, for the education	65-66
6	Policies and Procedures	Document describing significant policies and procedures of the stock broker	67-69
VOLUNTARY DOCUMENTS AS PROVIDED BY THE STOCK BROKER			
7	B2B Power of Attorney for Broking and Other Products & Services (Stamp Rs. 100/-)	Power of Attorney in favour of Geojit to operate client's demat account/mutual fund/IPO to facilitate transactions	23-34
8	Declaration	Declaration by client	35-36
9	Letter of Confirmation	Confirmation letter from client	37-39
10	Running Account	Authorization by client to retain funds/securities in trading account to meet settlement obligations	40
11	NRI Undertaking	To create awareness about RBI rules and regulations	41
12	Undertaking for NRO Non-PIS Account	Investing under Non-Repatriation Basis	42
13	Declaration of Non-repatriation Basis NRO Shares	Declaration of shares under Non-Repatriation Basis	43
14	Equity SIP Terms and Conditions	To avail Equity SIP	44-45
15	Disclosure	Disclosure by Geojit	46
16	Trading - Client Authorization to Third Party	Trading - Client Authorization to Third Party	47
17	Declaration cum Undertaking for Mobile Number	Declaration cum Undertaking for Mobile Number (DND)	48
18	Acknowledgement	Receipt of Booklet viz. RDD, Rights and Obligations, Do's and Don't's and Policies and Procedures	49
18	NACH	Authorization to debit funds from client designated bank A/C to meeting funds for systematic SIPs	51
19	Additional rights and obligations for broking and other products and services	To avail value added products and services from Geojit (including NACH/ECS agreement)	70-99

Geojit Financial Services Ltd. Corporate Identity Number: L67120KL1994PLC008403 GST Number: 32AABCG1935E1Z6			
Registration No. & Date			Compliance Officer Name/phone/e-mail id
Stock Broker: INZ000104737 / 09-05-2017			Zacharia K G 0484-2901000 compliance@geojit.com
NSE Member Code:13372	BSE Member Code:328		
Port Folio Manager : Reg no. INP000003203, Date : 16.02.2012			
NCDEX Member Code: 1243	MCX Member Code: 55920	ICEX Member Code: 3007	Jayadevan A. 0484-2901000 compliance@geojit.com
Depository	NSDL/CDSL	IN - DP-325-2017 Date: 06.06.2017	Indu K 0484- 2901000 indu_k@geojit.com
Investment Adviser	INA200002817, Date : 20.03.2015		
Research Analyst	INH200000345, Date : 20.04.2015		
AMFI reg. no & date	ARN 0098 , Date: 09.05.2012		
Reg. Office/Correspondence Address: 34/659-P, Civil Line Road, Padivattom, Kochi-682024, Phone: 0484-290100, Fax: 0484-2979695, Website: www.geojit.com			
CEO name, phone no & email id: Mr. C J George, 0484 2901000, md@geojit.com			
For any grievance/dispute please contact Geojit Financial Services Ltd. at the above address or email id grievances@geojit.com and phone: 91-484-2901000. In case not satisfied with the response, please contact the concerned exchange(s) at the contact details given below:			
Exchange	Department	Email ID	Phone No.
National Stock Exchange of India Ltd	Investor Grievance Cell	ignse@nse.co.in	1800 2660 058
Bombay Stock Exchange Ltd	Investor Services	is@bseindia.com	022-2272 8138
National Commodities & Derivative Exchange of India Ltd (NCDEX)	Investor Grievances	ig@ncdex.com	022-6640 6789
Multi Commodity Exchange of India Ltd. (MCX)	Arbitration & IG	grievance@mcxindia.com	022-6649 4070
Indian Commodity Exchange Ltd ICEX)	Grievance Redressal	grievance@icexindia.com	022-4038 1500

You can also lodge your grievances with SEBI at <http://scores.gov.in>. For any queries, feedback or assistance, please contact SEBI Office on Toll Free Helpline at 1800 220 7575 / 1800 266 7575.

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Important Instructions:

- A) Fields marked with '**' are mandatory fields.
- B) Please fill the form in English and in BLOCK letters.
- C) Please fill the date in DD-MM-YYYY format.
- D) Please read section wise detailed guidelines / instructions at the end.
- E) List of State / U.T code as per Indian Motor Vehicle Act, 1988 is available at the end.
- F) List of two character ISO 3166 country codes is available at the end.
- G) KYC number of applicant is mandatory for update application.
- H) For particular section update, please tick (✓) in the box available before the section number and strike off the sections not required to be updated.

General Instructions:

- 1 Fields marked with '**' are mandatory fields.
- 2 Tick (✓) wherever applicable.
- 3 Self-Certification of documents is mandatory.
- 4 Please fill the form in English and in BLOCK Letters.
- 5 Please fill all dates in DD-MM-YYYY format.
- 6 Wherever state code and country code is to be furnished, the same should be the two-digit code as per Indian Motor Vehicle, 1988 and ISO 3166 country code respectively list of which is available at the end.
- 7 KYC number of applicant is mandatory for updation of KYC details.
- 8 For particular section update, please tick (✓) in the box available before the section number and strike off the sections not required to be updated.

Other Instructions:

If any proof of identity or address is in a foreign language, then translation into English is required.

A Clarification / Guidelines on filling 'Personal Details' section

- 1 Name: Please state the name with Prefix (Mr/Mrs/Ms/Dr/etc.). The name should match the name as mentioned in the Proof of Identity submitted failing which the application is liable to be rejected.
- 2 Either father's name or spouse's name is to be mandatorily furnished.

B Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India

- 1 **Tax identification Number (TIN):** TIN need not be reported if it has not been issued by the jurisdiction. However, if the said jurisdiction has issued a high integrity number with an equivalent level of identification (a "Functional equivalent"), the same may be reported. Examples of that type of number for individual include, a social security/insurance number, citizen/personal identification/services code/number, and resident registration number)

C Clarification / Guidelines on filling 'Proof of Identity [Pol]' section

- 1 If driving license number or passport is provided as proof of identity then expiry date is to be mandatorily furnished.
- 2 Mention identification / reference number if 'Z- Others (any document notified by the central government)' is ticked.

D Clarification / Guidelines on filling 'Proof of Address [PoA] - Current / Permanent / Overseas Address details' section

- 1 PoA to be submitted only if the submitted Pol does not have an address or address as per Pol is invalid or not in force.
- 2 State / U.T Code and Pin / Post Code will not be mandatory for Overseas addresses.

E Clarification / Guidelines on filling 'Proof of Address [PoA] - Correspondence / Local Address details' section

- 1 To be filled only in case the PoA is not the local address or address where the customer is currently residing. No separate PoA is required to be submitted.
- 2 In case of multiple correspondence / local addresses, Please fill 'Annexure A1'

F Clarification / Guidelines on filling 'Contact details' section

- 1 Please mention two-digit country code and 10 digit mobile number (e.g. for Indian mobile number mention 91-9999999999).
- 2 Do not add '0' in the beginning of Mobile number.

G Clarification / Guidelines on filling 'Related Person details' section

- 1 Provide KYC number of related person if available.

H Clarification / Guidelines on filling 'Related Person details – Proof of Identity [Pol] of Related Person' section

- 1 Mention identification / reference number if 'Z- Others (any document notified by the central government)' is ticked.

List of two – digit state / U.T codes as per Indian Motor Vehicle Act, 1988

State / U.T	Code	State / U.T	Code	State / U.T	Code
Andaman & Nicobar	AN	Himachal Pradesh	HP	Pondicherry	PY
Andhra Pradesh	AP	Jammu & Kashmir	JK	Punjab	PB
Arunachal Pradesh	AR	Jharkhand	JH	Rajasthan	RJ
Assam	AS	Karnataka	KA	Sikkim	SK
Bihar	BR	Kerala	KL	Tamil Nadu	TN
Chandigarh	CH	Lakshadweep	LD	Telangana	TS
Chattisgarh	CG	Madhya Pradesh	MP	Tripura	TR
Dadra and Nagar Haveli	DN	Maharashtra	MH	Uttar Pradesh	UP
Daman & Diu	DD	Manipur	MN	Uttarakhand	UA
Delhi	DL	Meghalaya	ML	West Bengal	WB
Goa	GA	Mizoram	MZ	Other	XX
Gujarat	GJ	Nagaland	NL		
Haryana	HR	Orissa	OR		

List of ISO 3166 two- digit Country Code

Country	Country Code	Country	Country Code	Country	Country Code	Country	Country Code
Afghanistan	AF	Dominican Republic	DO	Libya	LY	Saint Pierre and Miquelon	PM
Aland Islands	AX	Ecuador	EC	Liechtenstein	LI	Saint Vincent and the Grenadines	VC
Albania	AL	Egypt	EG	Lithuania	LT	Samoa	WS
Algeria	DZ	El Salvador	SV	Luxembourg	LU	San Marino	SM
American Samoa	AS	Equatorial Guinea	GQ	Macao	MO	Sao Tome and Principe	ST
Andorra	AD	Eritrea	ER	Macedonia, the former Yugoslav Republic of	MK	Saudi Arabia	SA
Angola	AO	Estonia	EE	Madagascar	MG	Senegal	SN
Anguilla	AI	Ethiopia	ET	Malawi	MW	Serbia	RS
Antarctica	AQ	Falkland Islands (Malvinas)	FK	Malaysia	MY	Seychelles	SC
Antigua and Barbuda	AG	Faroe Islands	FO	Maldives	MV	Sierra Leone	SL
Argentina	AR	Fiji	FJ	Mali	ML	Singapore	SG
Armenia	AM	Finland	FI	Malta	MT	Sint Maarten (Dutch part)	SX
Aruba	AW	France	FR	Marshall Islands	MH	Slovakia	SK
Australia	AU	French Guiana	GF	Martinique	MQ	Slovenia	SI
Austria	AT	French Polynesia	PF	Mauritania	MR	Solomon Islands	SB
Azerbaijan	AZ	French Southern Territories	TF	Mauritius	MU	Somalia	SO
Bahamas	BS	Gabon	GA	Mayotte	YT	South Africa	ZA
Bahrain	BH	Gambia	GM	Mexico	MX	South Georgia and the South Sandwich Islands	GS
Bangladesh	BD	Georgia	GE	Micronesia, Federated States of	FM	South Sudan	SS
Barbados	BB	Germany	DE	Moldova, Republic of	MD	Spain	ES
Belarus	BY	Ghana	GH	Monaco	MC	Sri Lanka	LK
Belgium	BE	Gibraltar	GI	Mongolia	MN	Sudan	SD
Belize	BZ	Greece	GR	Montenegro	ME	Suriname	SR
Benin	BJ	Greenland	GL	Montserrat	MS	Svalbard and Jan Mayen	SJ
Bermuda	BM	Grenada	GD	Morocco	MA	Swaziland	SZ
Bhutan	BT	Guadeloupe	GP	Mozambique	MZ	Sweden	SE
Bolivia, Plurinational State of	BO	Guam	GU	Myanmar	MM	Switzerland	CH
Bonaire, Sint Eustatius and Saba	BQ	Guatemala	GT	Namibia	NA	Syrian Arab Republic	SY
Bosnia and Herzegovina	BA	Guernsey	GG	Nauru	NR	Taiwan, Province of China	TW
Botswana	BW	Guinea	GN	Nepal	NP	Tajikistan	TJ
Bouvet Island	BV	Guinea-Bissau	GW	Netherlands	NL	Tanzania, United Republic of	TZ
Brazil	BR	Guyana	GY	New Caledonia	NC	Thailand	TH
British Indian Ocean Territory	IO	Haiti	HT	New Zealand	NZ	Timor-Leste	TL
Brunei Darussalam	BN	Heard Island and McDonald Islands	HM	Nicaragua	NI	Togo	TG
Bulgaria	BG	Holy See (Vatican City State)	VA	Niger	NE	Tokelau	TK
Burkina Faso	BF	Honduras	HN	Nigeria	NG	Tonga	TO
Burundi	BI	Hong Kong	HK	Niue	NU	Trinidad and Tobago	TT
Cabo Verde	CV	Hungary	HU	Norfolk Island	NF	Tunisia	TN
Cambodia	KH	Iceland	IS	Northern Mariana Islands	MP	Turkey	TR
Cameroon	CM	India	IN	Norway	NO	Turkmenistan	TM
Canada	CA	Indonesia	ID	Oman	OM	Turks and Caicos Islands	TC
Cayman Islands	KY	Iran, Islamic Republic of	IR	Pakistan	PK	Tuvalu	TV
Central African Republic	CF	Iraq	IQ	Palau	PW	Uganda	UG
Chad	TD	Ireland	IE	Palestine, State of	PS	Ukraine	UA
Chile	CL	Isle of Man	IM	Panama	PA	United Arab Emirates	AE
China	CN	Israel	IL	Papua New Guinea	PG	United Kingdom	GB
Christmas Island	CX	Italy	IT	Paraguay	PY	United States	US
Cocos (Keeling) Islands	CC	Jamaica	JM	Peru	PE	United States Minor Outlying Islands	UM
Colombia	CO	Japan	JP	Philippines	PH	Uruguay	UY
Comoros	KM	Jersey	JE	Pitcairn	PN	Uzbekistan	UZ
Congo	CG	Jordan	JO	Poland	PL	Vanuatu	VU
Congo, the Democratic Republic of the	CD	Kazakhstan	KZ	Portugal	PT	Venezuela, Bolivarian Republic of	VE
Cook Islands	CK	Kenya	KE	Puerto Rico	PR	Viet Nam	VN
Costa Rica	CR	Kiribati	KI	Qatar	QA	Virgin Islands, British	VG
Cote d'Ivoire / Côte d'Ivoire	CI	Korea, Democratic People's Republic of	KP	Reunion / Réunion	RE	Virgin Islands, U.S.	VI
Croatia	HR	Korea, Republic of	KR	Romania	RO	Wallis and Futuna	WF
Cuba	CU	Kuwait	KW	Russian Federation	RU	Western Sahara	EH
Curacao / Curaçao	CW	Kyrgyzstan	KG	Rwanda	RW	Yemen	YE
Cyprus	CY	Lao People's Democratic Republic	LA	Saint Barthelemy / Saint Barthélemy	BL	Zambia	ZM
Czech Republic	CZ	Latvia	LV	Saint Helena, Ascension and Tristan da Cunha	SH	Zimbabwe	ZW
Denmark	DK	Lebanon	LB	Saint Kitts and Nevis	KN		
Djibouti	DJ	Lesotho	LS	Saint Lucia	LC		
Dominica	DM	Liberia	LR	Saint Martin (French part)	MF		

Geojit Financial Services Ltd.

Corporate Identity Number: L67120KL1994PLC008403

34/659-P, Civil Line Road, Padivattom, Kochi-682024. Phone: 0484-2901000

CENTRAL KYC REGISTRY

KYC Application Form | Individual

For office use only

Application Type*

☐ New

☐ Update

KYC Number

(Mandatory for KYC update request)

Account Type*

☐ Normal

☐ Minor

Please read the Instructions before filling the form.

1. PERSONAL DETAILS (Please refer instruction A at the end)

☐ Name* (Same as ID proof)

Prefix (Mr./Mrs./Ms)

First Name

Middle Name

Last Name

Prefix (Mr./Mrs./Ms)

Maiden Name

Prefix (Mr./Mrs./Ms)

Father / Spouse Name*

Prefix (Mr./Mrs./Ms)

Mother Name

Date of Birth*

Gender*

☐ M- Male

☐ F- Female

☐ T-Transgender

Marital Status*

☐ Married

☐ Unmarried

☐ Others

Nationality*

☐ IN- Indian

☐ Others (Specify)

Residential Status*

☐ Resident Individual

☐ Non Resident Indian

☐ Foreign National

Occupation Type*

☐ S-Service (☐ Private Sector

☐ Public Sector

☐ Government Sector)

☐ O-Others (☐ Professional

☐ Self Employed

☐ Retired

☐ Housewife

☐ Student)

☐ B-Business

☐ X- Not Categorised

PAN Card

PHOTO

Signature / Thumb of Applicant

2. TICK IF APPLICABLE ☐ RESIDENCE FOR TAX PURPOSES IN JURISDICTION(S) OUTSIDE INDIA (Please refer instruction B at the end)

ADDITIONAL DETAILS REQUIRED* (Mandatory only if section 2 is ticked)

ISO 3166 Country Code of Jurisdiction of Residence*

Tax Identification Number or equivalent (If issued by jurisdiction)*

Place/City of Birth*

ISO 3166 Country Code of Birth*

ADDRESS IN THE JURISDICTION DETAILS WHERE APPLICANT IS RESIDENT OUTSIDE INDIA FOR TAX PURPOSES*

☐ Same as Permanent / Overseas Address details

☐ Same as Correspondence / Current / Local / Overseas Address details

Address

(Please Specify - if the Overseas address different from point no. 3 or 4)

3. PROOF OF IDENTITY(POI) AND ADDRESS(POA)* (Please refer instruction C and D at the end)

 (Certified copy of any one of the following Proof of Identity[PoI] and Proof of Address [PoA] needs to be submitted)

☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card

☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NREGA Job Card

☐ E- National population Register Letter

☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

Permanent / Overseas Address

Line 1*

Line 2

Line 3

City/ Town/ Village*

District*

Pin/Post Code*

State/U.T Code*

ISO 3166 Country Code*

4. CORRESPONDENCE / CURRENT / LOCAL / OVERSEAS ADDRESS* (Please refer instruction E at the end)☐ Same as Permanent / Overseas Address details(Certified copy of any one of the following Proof of Address [PoA] needs to be submitted)☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NREGA Job Card☐ E- National population Register Letter☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

☐ Other Proof Of Address (POA)

(Please Specify)

Line 1*

Line 2

Line 3

City/ Town/ Village*

District*

Pin/Post Code*

State/U.T Code*

ISO 3166 Country Code*

5. CONTACT DETAILS (All communications will be sent on provided Mobile no. / Email-ID) (Please refer instruction F at the end)

Tel.(Off)

Tel.(Res)

Mobile

FAX

Email ID

6. REMARKS (If any)**7. APPLICANT DECLARATION**

This is to confirm that I have approached Geojit Financial Services Ltd (Geojit) to open a Trading/Demat/PMS account and have voluntarily provided my Aadhaar copy towards Proof of Identity(PoI)/Proof of Address (PoA) requirements. I declare that:

- Geojit has informed me that the information collected from my Aadhaar will be used only for the above purpose for which it has been provided by me.
- I am aware that the submission of my Aadhaar is not mandatory and that there are alternatives to the submission of Aadhaar.
- Geojit has my explicit consent to collect, store and use my Aadhaar details for the purpose stated above and related purposes.
- Geojit has confirmed to me that my Aadhaar number or other details will not be shared by it with any person/authority without my consent except as required under any law/regulatory requirement.
- I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I 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 aware that I may be held liable for it.
- I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.



Date :

Place :

Signature / Thumb Impression of Applicant

8. ATTESTATION / FOR OFFICE USE ONLYDocuments Received ☐ Certified Copies ☐ Original Verified and Self-Attested Document Copies Received**IN - PERSON VERIFICATION (IPV) and KYC VERIFICATION CARRIED OUT BY**

Date

Emp. Name

Emp. Code

Emp. Designation

Emp. Branch

[Employee Signature]

INSTITUTION DETAILS

Name

Code

[Institution Stamp]

Annexure A1

Geojit Financial Services Ltd.

Corporate Identity Number: L67120KL1994PLC008403

34/659-P, Civil Line Road, Padivattom, Kochi-682024. Phone: 0484-2901000

CENTRAL KYC REGISTRY

KYC Application Form | Individual

For office use only

Application Type*

☐ New☐ Update☐ Delete

KYC Number

(Mandatory for KYC update request)

Annexure A1 - Related Person

Please read the Instructions before filling the form.

☐ 1. DETAILS OF RELATED PERSON (Please refer instruction G at the end)☐ Addition of Related Person ☐ Deletion of Related Person ☐ Updation

KYC Number of Related Person (if available*)

Related Person Type*

☐ Guardian of Minor☐ Assignee☐ Authorized Representative☐ Name* (Same as ID proof)

Prefix (Mr./Mrs./Ms)

First Name

Middle Name

Last Name

Prefix (Mr./Mrs./Ms)

Maiden Name

Prefix (Mr./Mrs./Ms)

Father / Spouse Name*

Prefix (Mr./Mrs./Ms)

Mother Name

Date of Birth*

Gender*

☐ M- Male☐ F- Female☐ T-Transgender

Marital Status*

☐ Married☐ Unmarried☐ Others

Nationality*

☐ IN- Indian☐ Others (Specify)

Residential Status*

☐ Resident Individual☐ Non Resident Indian☐ Foreign National

PAN Card



Signature / Thumb of Applicant

PHOTO

☐ 2. PROOF OF IDENTITY(POI) AND ADDRESS(POA)* (Please refer instruction C and D at the end)(Certified copy of any one of the following Proof of Identity[PoI] and Proof of Address [PoA] needs to be submitted)☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NREGA Job Card☐ E- National population Register Letter☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

Permanent / Overseas Address

Line 1*

Line 2

Line 3

City/ Town/ Village*

District*

Pin/Post Code*

State/U.T Code*

ISO 3166 Country Code*

3. CORRESPONDENCE / CURRENT / LOCAL / OVERSEAS ADDRESS* (Please refer instruction E at the end)

☐ Same as Permanent / Overseas Address details(Certified copy of any one of the following Proof of Address [PoA] needs to be submitted)☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NREGA Job Card☐ E- National population Register Letter☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

☐ Other Proof Of Address (POA)

(Please Specify)

Annexure A1

Line 1*	<div style="border: 1px solid black; height: 15px;"></div>
Line 2	<div style="border: 1px solid black; height: 15px;"></div>
Line 3	<div style="border: 1px solid black; height: 15px;"></div>
District*	<div style="border: 1px solid black; width: 100px; height: 15px;"></div> Pin/Post Code* <div style="border: 1px solid black; width: 100px; height: 15px;"></div> State/U.T Code* <div style="border: 1px solid black; width: 50px; height: 15px;"></div> ISO 3166 Country Code* <div style="border: 1px solid black; width: 50px; height: 15px;"></div>

4. CONTACT DETAILS (All communications will be sent on provided Mobile no. / Email-ID) (Please refer instruction F at the end)

Tel.(Off)	<div style="border: 1px solid black; width: 100px; height: 15px;"></div>	Tel.(Res)	<div style="border: 1px solid black; width: 100px; height: 15px;"></div>	Mobile	<div style="border: 1px solid black; width: 100px; height: 15px;"></div>
FAX	<div style="border: 1px solid black; width: 100px; height: 15px;"></div>	Email ID	<div style="border: 1px solid black; width: 400px; height: 15px;"></div>		

5. REMARKS (If any)

6. APPLICANT DECLARATION

This is to confirm that I have approached Geojit Financial Services Ltd (Geojit) to open a Trading/Demat/PMS account and have voluntarily provided my Aadhaar copy towards Proof of Identity(PoI)/Proof of Address (PoA) requirements. I declare that:

- Geojit has informed me that the information collected from my Aadhaar will be used only for the above purpose for which it has been provided by me.
- I am aware that the submission of my Aadhaar is not mandatory and that there are alternatives to the submission of Aadhaar.
- Geojit has my explicit consent to collect, store and use my Aadhaar details for the purpose stated above and related purposes.
- Geojit has confirmed to me that my Aadhaar number or other details will not be shared by it with any person/authority without my consent except as required under any law/regulatory requirement.
- I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I 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 aware that I may be held liable for it.
- I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.



Signature / Thumb Impression of Applicant

Date : - - Place :

7. ATTESTATION / FOR OFFICE USE ONLY

Documents Received ☐ Certified Copies ☐ Original Verified and Self-Attested Document Copies Received

IN - PERSON VERIFICATION (IPV) and KYC VERIFICATION CARRIED OUT BY

Date	<div style="border: 1px solid black; width: 100px; height: 15px;"></div>
Emp. Name	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>
Emp. Code	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>
Emp. Designation	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>
Emp. Branch	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>

[Employee Signature]

INSTITUTION DETAILS

Name	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>
Code	<div style="border: 1px solid black; width: 300px; height: 15px;"></div>

[Institution Stamp]

D. CONTACT DETAILS (All communications will be sent to Mobile number / Email-ID provided may be used) (Please refer instruction D at the end)

[illegible]

E. NUMBER OF RELATED PERSONS (Please refer instruction E at the end)

F. REMARKS (If any)

[illegible]

G. APPLICATION DECLARATION

I hereby declare that the details furnished above are true and correct to the best of my/our knowledge and belief and I 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.

I/We hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address

[illegible]

Date:

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Signature / Thumb Impression of authorised person(s)

H. ATTESTATION / FOR OFFICE USE ONLY

Documents Received ☐ Certified Copies ☐ Equivalent e-document
☐ (Originals verified) Self certified document copies received ☐ (Attested) True copies of documents received

KYC VERIFICATION CARRIED OUT BY

Identity Verification ☐ Done Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

[illegible][illegible][illegible][illegible]

Employee Signature

INSTITUTION DETAILS

Name _____

[illegible]

Institution Stamp

For office use only

Application Type* ☐ New ☐ Update ☐ DeleteKYC Number (Mandatory for KYC update request)

ANNEXURE A2 - Related Persons

Please read the Instructions before filling the form

A. DETAILS OF RELATED PERSON (please refer instruction E at the end)

☐ Addition of Related Person☐ Deletion of Related Person☐ Update Related Person DetailsKYC Number of Related Person (if available*) If KYC number is available, only
'Related Person Type' & 'Name' is mandatory

Related Person Type*

☐ Director☐ Promoter☐ Karta☐ Trustee☐ Partner☐ Court Appointment Official☐ Proprietor☐ Beneficiary☐ Authorised Signatory☐ Beneficial owner☐ Power of Attorney Holder☐ Other (Please specify)DIN (Director Identification Number)

Mandatory if Related Person Type is Director

A.1 Personal Details (Please refer instruction E at the end)

Name* (Same as ID Proof)

Prefix (Mr./Mrs./Ms.)

First Name

Middle Name

Last Name

Prefix (Mr./Mrs./Ms.)

Maiden Name

Prefix (Mr./Mrs./Ms.)

Father / Spouse Name*

Prefix (Mr./Mrs./Ms.)

Mother Name

Date of Birth

Gender*

☐ M-Male☐ F-Female☐ T-Transgender

Marital Status*

☐ Married☐ Unmarried☐ Others

Nationality*

☐ IN-Indian☐ Others Please specify

Residential Status*

☐ Resident Individual☐ Non Resident Indian☐ Foreign National

PAN Card



Photo

B. PROOF OF IDENTITY (POI) AND ADDRESS (POA)* (please refer instruction E at the end)

(Certified copy of any one of the following Proof of Identity (PoI) and Proof of Address (PoA) needs to be submitted)

☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NIREGA Job Card☐ E- National population Letter☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

Permanent / Overseas Address

Line 1*

Line 2

Line 3

City / Town / Village

District

PIN / Post Code*

State / U.T. Code*

ISO 3166 Country Code*

C. CORRESPONDENCE / CURRENT / LOCAL / OVERSEAS ADDRESS* (please refer instruction E at the end)

☐ Same as Permanent / Overseas Address details (Certified copy of any one of the following Proof of Address (PoA) needs to be submitted)☐ A- Passport Number

Passport Expiry Date

☐ B- Voter ID Card☐ C- Driving Licence

Driving Licence Expiry Date

☐ D- NIREGA Job Card☐ E- National population Letter☐ F- UID (Aadhaar)

(Please read applicant declaration carefully)

☐ Other Proof of Address (PoA)Please specify

Annexure A2 | Legal Entity | Other than individuals

Correspondence / Current / Local / Overseas Address

Line 1*																				
Line 2																				
Line 3											City / Town / Village									
District						PIN / Post Code*					State / U.T. Code*					ISO 3166 Country Code*				

D. CONTACT DETAILS (All communications will be sent on provided Mobile No. / Email ID)(Please refer instruction D at the end)

Tel. (Off)						—						Tel. (Res)						—					
FAX						—						Mobile						—					
Email ID																							

E. TICK IF APPLICABLE ☐ RESIDENCE FOR TAX PURPOSES IN JURISDICTION(S) OUTSIDE INDIA (Please refer instruction E (Point 5) at the end)

ADDITIONAL DETAILS REQUIRED* (Mandatory only if section E is ticked)

ISO 3166 Country Code of Jurisdiction of Residence*													
Tax Identification Number or equivalent (If issued by jurisdiction)*													
Place/City of Birth*											ISO 3166 Country Code of Birth*		

ADDRESS IN THE JURISDICTION DETAILS WHERE APPLICANT IS RESIDENT OUTSIDE INDIA FOR TAX PURPOSES*

☐ Same as Permanent / Overseas Address details ☐ Same as correspondence / Current / Local / Overseas Address details

Address (Please Specify - If the Overseas address different from point no B and C)

F. REMARKS (If any)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

G. APPLICATION DECLARATION

This is confirm that I have approached Geojit Financial Services Ltd. (Geojit) to open a Trading/Demat/PMS account and have voluntarily provided my Aadhaar copy towards Proof of Identity (PoI) / Proof of Address (PoA) requirements. I declare that:

- Geojit has informed me that the information collected from my Aadhaar will be used only for the above purpose for which it has been provided by me.
- I am aware that the submission of my Aadhaar is not mandatory and that there are alternatives to the submission of Aadhaar.
- Geojit has my explicit consent to collect, store and use my Aadhaar details for the purpose stated above and related purposes.
- Geojit has confirmed to me that my Aadhaar number or other details will not be shared by it with any person/authority without my consent except as required under any law/regulatory requirement.
- I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or unique or misleading or misrepresenting I am aware that I may be held liable for it.
- I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.

Signature / Thumb Impression of authorised person(s)

Place:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

 Date:

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

H. ATTESTATION / FOR OFFICE USE ONLY

Documents Received ☐ Certified Copies ☐ (Originals verified) Self certified document copies received

IN-PERSON VERIFICATION (IPV) AND KYC VERIFICATION CARRIED OUT BY

Date	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>								D	D	M	M	Y	Y	Y	Y				
D	D	M	M	Y	Y	Y	Y													
Emp. Name																				
Emp. Code											Employee Signature									
Emp. Designation																				
Emp. Branch																				

INSTITUTION DETAILS

Name																					Institution Stamp
Code																					

INSTRUCTIONS / CHECK LIST FOR FILLING KYC FORM

A. IMPORTANT POINTS:

- Self attested copy of PAN card is mandatory for all clients.
- Copies of all the documents submitted by the applicant should be self-attested and accompanied by originals for verification. In case the original of any document is not produced for verification, then the copies should be properly attested by entities authorized for attesting the documents, as per the below mentioned list.
- If any proof of identity or address is in a foreign language, then translation into English is required.
- Name & address of the applicant mentioned on the KYC form, should match with the documentary proof submitted.
- If correspondence & permanent address are different, then proofs for both have to be submitted.
- Sole proprietor must make the application in his individual name & capacity.
- For non-residents and foreign nationals, [allowed to trade subject to RBI and FEMA guidelines], copy of passport/PIOCard/OCI Card and overseas address proof is mandatory.
- For foreign entities, CIN is optional; and in the absence of DIN no. for the directors, their passport copy should be given.
- In case of Merchant Navy NRI's, Mariner's declaration or certified copy of CDC [Continuous Discharge Certificate] is to be submitted.
- For opening an account with Depository participant or Mutual Fund, for a minor, photocopy of the School leaving Certificate/ Mark sheet issued by Higher Secondary Board/Passport of Minor/ Birth Certificate must be provided.
- Politically Exposed Persons [PEP] are defined as individuals who are or have been entrusted with prominent public functions, e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/military officers, senior executives of state owned corporations, important political party officials, etc.

B. Proof of Identity[POI]: List of documents admissible as Proof of identity:

- PAN Card with photograph. This is a mandatory requirement for all applicants except those who are specifically exempt from obtaining PAN[listed in Section D].
- Unique identification Number [UID] [Aadhaar] / Passport / Voter ID card / Driving license.
- Identity card/ document with applicant's Photo, issued by any of the following: Central/State Government and its Departments, Statutory/regulatory authorities, Public Sector Undertakings, Schedules Commercial Banks, Public Financial Institutions, Colleges affiliated to Universities, Professional Bodies such as ICAI, ICWAI, ICSI, Bar Council etc., to their Members; and Credit cards/Debit cards issued by banks.

C. Proof of Address [POA]: List of documents admissible as proof of Address: [* Documents having an expiry date should be valid on the date of submission.]

- Passport/Voters Identity Card/Ration Card/Aadhaar Card/ Registered Lease or Sale Agreement of Residence/Driving License/

- Flat Maintenance bill/Insurance Copy.
- Utility bills like Telephone Bill [only land line]. Electricity bill or Gas bill Not more than 3 months old.
- Bank Account Statement/Passbook-Not more than 3 months old.
- Self-declaration by High Court Supreme Court judges, giving the new address in respect of their own accounts.
- Proof of address issued by any of the following: Bank Managers of Scheduled Commercial Banks/Scheduled Co-operative Bank/ Multinational Foreign Banks/Gazetted Officer/Notary public/ Elected representatives to the Legislative Assembly/Parliament/ Document issued by any Govt. or Statutory Authority.
- Identity card/document with address, issued by any of the following Central/State Government and its Departments, Statutory/Regulatory Authorities, Public Sector Undertaking, Schedules Commercial Banks, Public Financial Institutions, Colleges affiliated to Universities and Professional Bodies such as ICAI, ICWAI, ICSI, Bar Council etc., to their Members.
- For FII/sub account, Power of Attorney given by FII/sub-account to the Custodians [which are duly notarized and/or apostilled or consularised] that gives the registered address should be taken.
- The proof of address in the name of the spouse may be accepted.

D. Exemptions clarifications to PAN [*Sufficient documentary evidence in support of such claims to be collected.]

- In case of transactions undertaken on behalf of Central Government and /or State Government and by officials appointed by Courts e.g. Officials liquidator, Court receive etc.
- Investors residing in the state of Sikkim.
- UN entities/multilateral agencies exempt from paying taxes/filling tax returns in India.
- SIP of Mutual Funds up to Rs. 50000/- p.a.
- In case of Institutional clients, names, FIIs, MFs, VCFs, FVCIs, Schedules Commercial Banks, Multilateral and Bilateral Development Financial Institutions, State Industrial Development Corporations, Insurance Companies registered with IRDA and Public Financial Institutions as defined under Section 4A of the Companies Act, 1956, Custodians shall verify the PAN Card details with the original PAN card and provide duly certified copies of such verified PAN details to the intermediary.

E. List of people authorized to attest the documents:

- Notary Public, Gazetted Officer, manager of a Schedules Commercial/Co-operative Bank or Multinational Foreign Banks [Name, designation & Seal should be affixed on the copy]
- In case of NRIs, authorized officials of overseas branches of Scheduled Commercial Banks registered in India, Notary Public, Court Magistrate, Judge, Indian Embassy/Consulate General in the country where the client resides are permitted to attest the documents.

F. In case of Non-Individuals, additional documents to be obtained from non-individuals, over & above the POI & POA, as mentioned below:

Types of entity	Documentary requirements
Corporate	<ul style="list-style-type: none"> Copy of the balance sheets for the last 2 financial years (to be submitted every year). Copy of latest share holding pattern including list of all those holding control, either directly or indirectly, in the company in terms of SEBI takeover Regulations, duly certified by the company secretary/Whole time director/MD(to be submitted every year). Photograph, POI, POA, PAN and DIN numbers of whole time directors/two directors in charge of day to day operations. Photograph, POI, POA, PAN of individual promoters holding control – either directly or indirectly. Copies of the memorandum and Articles and certificate of incorporation. Copy of the Board Resolution for investment in securities market. Authorized signatories list with specimen signatures.
Partnership firm	<ul style="list-style-type: none"> Copy of the balance sheets for the last 2 financial years (to be submitted every year). Certificate of registration (for registered partnership firms only). Copy of partnership deed. Authorized signatories list with specimen signatures. Photograph, POI, POA, PAN of Partners.
Trust	<ul style="list-style-type: none"> Copy of the balance sheets for the last 2 financial years (to be submitted every year). Certificate of registration (for registered trust only). Copy of Trust deed. List of trustees certified by managing trustees/CA. Photograph, POI, POA, PAN of Trustees.
HUF	<ul style="list-style-type: none"> PAN of HUF. Deed of declaration of HUF/List of coparceners. Bank passbook/Bank statement in the name of HUF. Photograph, POI, POA, PAN of Karta.
Unincorporated Association or a body of Individuals	<ul style="list-style-type: none"> Proof of Existence/Constitution document. Resolution of the managing body & power of Attorney granted to transact business on its behalf. Authorized signatories list with specimen signatures.
Banks/Institutional Investors	<ul style="list-style-type: none"> Copy of the constitution/registration or annual report/balance sheet for the last 2 financial years. Authorized signatories list with specimen signatures.
Foreign Institutional Investors (FII)	<ul style="list-style-type: none"> Copy of SEBI Registration certificate. Authorized signatories list with specimen signatures.
Army/Government Bodies	<ul style="list-style-type: none"> Self-certification on letter head. Authorized signatories list with specimen signatures.
Registered Society	<ul style="list-style-type: none"> Copy of Registration Certificate under Societies Registration Act. List of Managing Committee members. Committee resolution for persons authorized to act as authorized signatories with specimen signatures. True copy of Society Rules and Bye Laws certified by the Chairman/Secretary.

Details of Promoters / Trustees / Karta / Partners and Whole Time Directors Forming A Part of Know Your Client (KYC) Application Form for Non-individuals

Name of Applicant

PAN of the Applicant

Sl. No.	PAN	Name	DIN (For Directors) / UID (For Others)	Residential / Registered Address	Relationship with Applicant (i.e. promoters, whole time directors etc.	Whether Politically Exposed	Photograph
						<input type="checkbox"/> PEP <input type="checkbox"/> RPEP <input type="checkbox"/> NO	
						<input type="checkbox"/> PEP <input type="checkbox"/> RPEP <input type="checkbox"/> NO	
						<input type="checkbox"/> PEP <input type="checkbox"/> RPEP <input type="checkbox"/> NO	
						<input type="checkbox"/> PEP <input type="checkbox"/> RPEP <input type="checkbox"/> NO	
						<input type="checkbox"/> PEP <input type="checkbox"/> RPEP <input type="checkbox"/> NO	

Name & Signature of the Authorised Signatory(ies)

Date

D

D

M

M

Y

Y

Y

Y

PEP: Politically Exposed Person

RPEP: Related to Politically Exposed Person

Details of the Ultimate Beneficial Owner (natural person) in case of Non-individual account

Client Type: Company / Partnership / Unincorporated Associations / Body of Individuals / Trust/HUF

Sl. No.	Name	PAN	Related Entity	Relationship with the entity	Address of beneficial owner	Email Address	Contact Nos.
Branch Seal		Employee Code:		Employee Name:			
Date:		Place		Signature			

Please use additional copies of this form if required.

TRADING ACCOUNT RELATED DETAILS

I/We request you to open the following account(s) in my/our name as per the following details.

For Individuals/Sole Proprietorship/Partnership/HUF (Please fill boxes A & B)

Type of Trading Account	<input type="checkbox"/> Ordinary Resident <input type="checkbox"/> NRI-Repatriable <input type="checkbox"/> NRI-Non-Repatriable <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> HUF <input type="checkbox"/> Others (Please Specify)
-------------------------	---

A. SOLE/TRADING HOLDER DETAILS

Name of the Trading A/C Holder	
--------------------------------	--

B. OTHER DETAILS

Gross Annual Income Details (please specify)	Income Range per annum	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lac <input type="checkbox"/> 5-10 Lac <input type="checkbox"/> 10-25 Lac <input type="checkbox"/> 25-50 Lac <input type="checkbox"/> 50 Lacs to 1 Crore <input type="checkbox"/> 1-5 Crore <input type="checkbox"/> 5-10 Crore <input type="checkbox"/> > 10 Crore
	OR Net-worth as on (date)	D D M M Y Y Y Y ₹ _____ (*Net worth should not be older than 1 year)
Source of Funds (Please ensure to select at least one) (applicable for trading account holder or first holder in case of DP only a/c.	<input type="checkbox"/> Salary Income <input type="checkbox"/> Professional Income <input type="checkbox"/> Business Income <input type="checkbox"/> Rental Income <input type="checkbox"/> Fixed Deposits <input type="checkbox"/> Agricultural Income <input type="checkbox"/> Sale of Assets <input type="checkbox"/> Dividend Income <input type="checkbox"/> Loans <input type="checkbox"/> Gifts <input type="checkbox"/> Ancestral Property <input type="checkbox"/> Others: (pls specify)	
Occupation (please tick any one and give brief details)	<input type="checkbox"/> Private Sector <input type="checkbox"/> Public Sector <input type="checkbox"/> Government Service <input type="checkbox"/> Business <input type="checkbox"/> Professional <input type="checkbox"/> Agriculturist <input type="checkbox"/> Retired <input type="checkbox"/> Housewife <input type="checkbox"/> Student <input type="checkbox"/> Others	
Name of Employer/Establishment with full address		
Designation		
Please tick, if applicable	<input type="checkbox"/> Politically Exposed Person (PEP) <input type="checkbox"/> Related to a Politically Exposed Person (PEP)	

For Non-individual (Please fill boxes C&D)

Type of Trading Account	<input type="checkbox"/> Body Corporate <input type="checkbox"/> Bank <input type="checkbox"/> Trust Others (Please Specify)
-------------------------	---

C. SOLE/TRADING HOLDER DETAILS

Name of the Trading A/C Holder	
--------------------------------	--

D. OTHER DETAILS

Gross Annual Income Details (please specify)	Income Range per annum	<input type="checkbox"/> Below 1 Lac <input type="checkbox"/> 1-5 Lac <input type="checkbox"/> 5-10 Lac <input type="checkbox"/> 10-25 Lac <input type="checkbox"/> 25-50 Lac <input type="checkbox"/> 50 Lacs to 1 Crore <input type="checkbox"/> 1-5 Crore <input type="checkbox"/> 5-10 Crore <input type="checkbox"/> > 10 Crore
	OR Net-worth as on (date)	D D M M Y Y Y Y ₹ _____ (*Net worth should not be older than 1 year)
Professionals/Business Details* (applicable if professional Income/Business Income above is selected)	1) Profession/Business Name : 2) If Business, type of Business Activity :	
Name of Employer/Establishment with full address		
Designation		
Goods & Service Tax No.		
Please tick, if applicable, for any of your authorized signatories/Promoters/Partners/ Karta/ Trustees/whole time directors:	<input type="checkbox"/> Politically Exposed Person (PEP) <input type="checkbox"/> Related to a Politically Exposed Person (PEP)	

Is the entity involved / providing any of the following service

For Foreign Exchange / Money Changer Services	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Gaming / Gambling / Lottery Services (eg. Casinos, betting syndicates)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Money Lending / Pawning	<input type="checkbox"/> Yes	<input type="checkbox"/> No

For definition of PEP, please refer instructions on the page no.17 point no.5

E. DEPOSITORY ACCOUNT DETAILS (Demat master or recent holding statement issued by DP bearing name of the client)

Depository Participant Name	Depository Name	DP ID	Beneficiary ID (BO ID)
	NSDL/CDSL		

F. DOCUMENTARY EVIDENCE OF FINANCIAL DETAILS FOR DERIVATIVE CLIENTS (For Derivatives Trading)





<input type="checkbox"/> Copy of Tax Return	<input type="checkbox"/> Salary Certificate	<input type="checkbox"/> Net Worth Certificate	<input type="checkbox"/> Bank Statement for the last 6 months	Others, Please Specify
---	---	--	---	------------------------------

G. BANK DETAILS FOR TRADING ACCOUNT																		
Bank A/c No.																		
Bank Sub-type	<input type="checkbox"/> Savings Account <input type="checkbox"/> Current Account <input type="checkbox"/> Others																	
Bank Name (Full name)																		
Bank Branch Address (Write as per the manner discribed)	Building/Tower/Appartment/Palace/Chamber/Mansion																	
	Street/Road/Marg/Lane/Avenue/Rasta																	
	Area Name								City Name									
	PIN CODE																	
MICR Number																		
IFSC Number																		
In case of NRIs, RBI Reference No.*									RBI Approval Date		D	D	M	M	Y	Y	Y	Y

*Submit PIS permission copy obtained from bank

H. TRADING PREFERENCE

*Please sign in the relevant boxes where you wish to trade. Please strike off the segment not choosen by you.

Exchanges	Segments	
	Cash	F&O
NSE + BSE	 (Full signature required)	 (Full signature required)
	Currency Derivative	Mutual Fund
	 (Full signature required)	 (Full signature required)

If, you do not wish to trade on any Exchange and any of its segment, please mention here _____

If, in future, the client wants to trade on any new segment/new exchange, separate authorization/letter should be taken from the client by the stock broker.

I. PAST ACTIONS

Details of any action/proceedings initiated/pending/ taken by SEBI/ Stock exchange/any other authority and conviction by any court in India or abroad against the applicant/constituent or its Partners/ promoters/whole time directors/authorized persons in charge of dealing in securities during the last 3 years	
---	--

J. DEALINGS THROUGH SUB-BROKERS AND OTHER STOCK BROKERS

If client is dealing through the sub-broker, provide the following	Sub-broker's Name:					
	NSE SEBI Registration number					
	BSE SEBI Registration number					
	Registered office address					
	Phone		Fax		Website	
Whether dealing with any other stock broker/sub-broker (if case dealing with multiple	Name of stock broker				Name of Sub-Broker, if any	
	Client Code				Exchange	
	Details of disputes/dues pending from/to such stock broker/sub-broker					

K. ADDITIONAL DETAILS	
Whether you wish to receive Electronic Contract Note or Physical Contract Note (ECN) please specify	<input type="checkbox"/> Electronic Contract Note <input type="checkbox"/> Physical Contract Note
Whether you wish to avail of the facility of internet trading/ wireless technology (please specify)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number of years of Investment/Trading Experience	
In case of sole proprietor/partnership/ corporate, please indicate the name and address of the firm	
Receive Annual Reports, AGM notices and other communications from issuers and RTAs in Physical form	<input type="checkbox"/> Yes <input type="checkbox"/> No
SMS and email alerts to investors by stock exchanges. (Please tick whichever is applicable. If not ticked, assumed 'Not Required')	<input type="checkbox"/> SMS <input type="checkbox"/> Email <input type="checkbox"/> Both <input type="checkbox"/> Not Required
If Mobile number/Email id used belongs to a different person, specify the relationship & PAN (Mark "SELF" in case of own Mobile number/Email id)	Dependent Relationship (TICK Correct One)
	Mobile <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Child <input type="checkbox"/> Dependent Parent
	E-mail <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent Child <input type="checkbox"/> Dependent Parent
Name, designation, PAN, signature, residential address and photographs of persons authorized to deal in securities on behalf of company/firm/others:	
Any other information	

L. INTRODUCER DETAILS (optional) (Bank staff details to be mentioned here)	
Name of the Introducer	
Status of the Introducer	<input type="checkbox"/> B2B Bank Staff <input type="checkbox"/> Sub-broker <input type="checkbox"/> Remiser <input type="checkbox"/> Authorized Person <input type="checkbox"/> Existing Client <input type="checkbox"/> Others, please specify _____
Address of the Introducer	
Phone Number	
Signature of the Introducer	

M. NOMINATION DETAILS FOR TRADING ACCOUNT HOLDER (For Individuals only)	
<input type="checkbox"/> I/We wish to make a nomination (As per details given below) <input type="checkbox"/> I/We do not wish to make a nomination (Strike off the nomination details below)	
* Name of the Nominee	
* Relationship with the Nominee	
PAN / Proof of Identity of Nominee	* Date of Birth of Nominee
* Address of the Nominee with Pincode	
Tel (Res)	Mobile No. Email ID
If Nominee is a minor, details of guardian	
* Name of the guardian	* Relationship of Guardian
* Address of the guardian with Pincode	
Tel (Res)	Signature of guardian
Mobile No.	
* Mandatory fields.	

WITNESSES (Only applicable in case the account holder has made nomination)			
	Name	Address	Signature

N. DECLARATION FORM FOR OPTING OUT OF NOMINATION

To,
Geojit Financial Services Ltd.
34/659-P, Civil Line Road, Padivattom, Kochi-682024.

DP ID								
Client ID (only for demat account)								
Trade Code	Trading A/C holder Name				Trading A/C holder Signature			
Name(s) of Holder(s)					Signature(s) of holder			
Sole/First Holder (Mr. /Ms.)								
Sole/First Holder (Mr. /Ms.)								
Sole/First Holder (Mr. /Ms.)								
<p>I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our trading / demat 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 trading / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the trading / demat account.</p>								

O. RELATIVE OF GEOJIT EMPLOYEE (For Trading)

Are you a relative of Geojit Financial Services Ltd. employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please indicate your relationship with the employee	<input type="checkbox"/> Parent <input type="checkbox"/> Parent-in-law <input type="checkbox"/> Sibling <input type="checkbox"/> Spouse <input type="checkbox"/> Child
Employee code :	
Employee name :	

P. DECLARATION

- The rules and regulations of the Capital Market pertaining to an account which are in force now have been read by me/us and I/we have understood the same and I/we agree to abide by and to be bound by the rules as are in force from time to time for such accounts. 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. In case of nonresident account, I/we also declare that I / we have complied and will continue to comply with FEMA regulations.
- I/we understand and acknowledge the fact that I/we am/are at liberty to withdraw all or any of the information provided by me/us and the same shall be made by me/us in writing. I/we confirm and accept that such withdrawal shall entitle you to withdraw all or any of the services provided to me/us under the account opening documentation.
- I/We confirm having read/been explained and understood the contents of the document on policy and procedures of the stock broker and the tariff sheet.
- I/We further confirm having read and understood the contents of the "Standard Documents"
 - Rights and Obligations of stock broker, sub-broker and client for trading on Exchanges [including additional rights & obligations in case of internet/wireless technology based trading];
 - Uniform Risk Disclosure Documents [For all segments/exchanges] ;
 - Guidance note detailing Do's and Don'ts for trading on stock exchanges;

Note: The above mentioned documents [a, b, c] in the vernacular languages are available in our web-site <http://www.geojit.com/about-us/account-opening-forms>.


I/We do hereby agree to be bound by such provisions as outlined in these documents. I/We have also been informed that the standard set of documents has been displayed for information on stock broker's designated website .
- *I/We also understand the "Additional Rights and Obligations for Broking and Other Products and services" and acknowledge that this is Voluntary [non-mandatory] document for availing value added products and services as provided by Geojit Financial Services Ltd. and unconditionally agree to abide by the terms and conditions mentioned therein.
- I / We are aware that my/our trading/DP account will be opened as per name available in Income tax database.

* Strikeout if not applicable

I/We would like to receive the copy of the KYC & Standard Documents:-

Physical Mode ☐ ***Electronic Mode** ☐

**[If you require the document through electronic mode please ensure that you have registered your email id with us].*

Name of Trading Account Holder	Signature
	 (Full signature required)

Place :

Date:

INSTRUCTIONS/ CHECK LIST

1. Additional documents in case of trading in derivatives segments - illustrative list: Copy of ITR Acknowledgment Copy of Annual Accounts.

In case of salary income - Salary Slip, Copy of Form 16.	Net worth certificate.
Copy of demat account holding statement.	Bank account statement for last 6 months.
Any other relevant documents substantiating ownership of assets.	Self declaration with relevant supporting documents.

**In respect of other clients, documents as per risk management policy of the stock broker need to be provided by the client from time to time.*

2. Copy of cancelled cheque leaf / pass book / bank statement specifying name of the constituent, MICR Code or / and IFSC Code of the bank should be submitted.
3. For individuals:
 - a. Stock broker has an option of doing 'in-person' verification through web camera at the branch office of the stock broker/sub-broker's office.
 - b. In case of non-resident clients, employees at the stock broker's local office, overseas can do in-person, verification.
Further, considering the infeasibility of carrying out 'In-person' verification of the non-resident clients by the stock broker's staff, attestation of KYC documents by Notary Public, Court, Magistrate, Judge, Local Banker, Indian Embassy / Consulate General in the country where the client resides may be permitted.
4. For receiving Statement of Account in electronic form:
 - a. Client must ensure the confidentiality of the password of the email account.
 - b. Client must promptly inform the Participant if the email address has changed.
 - c. Client may opt to terminate this facility by giving 10 days prior notice. Similarly, Participant may also terminate this facility by giving 10 days prior notice.
5. Politically Exposed Persons [PEP] are defined as individuals who are or have been entrusted with prominent public functions, e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/military officers, senior executives of state owned corporations, important political party officials, etc.

FOR OFFICE USE ONLY

UCC Code allotted to the Client		
	Documents verified with Originals	Client Interviewed by
Name of the Employee		
Employee Code		
Designation of the employee		
Date		
Signature		
Place		

I/We undertake that we have made the client aware of 'Policy and Procedures', tariff sheet and all the non-mandatory documents. I/We have also made the client aware of 'Rights and Obligations' document (s), RDD and Guidance Note. I/We have given/sent him a copy of all the KYC documents. I/We undertake that any change in the 'Policy and Procedures', tariff sheet and all the non-mandatory documents would be duly intimated to the clients. I/We also undertake that any change in the 'Rights and Obligations' and RDD would be made available on my/our website, if any, for the information of the clients.

Signature of the Branch Manager
Date :

Seal/Stamp of Authorized Intermediary
(Branch/Sub-broker/Authorised Person)

P. DETAILS OF LEAD GENERATOR FOR TRADING BENEFITS

Employee name	
Employee Code	
Lead ID	

SCHEDULE OF CHARGES FOR CASH, F&O AND CURRENCY TRADING CLIENTS

*EQUITY CASH SEGMENT							
Offline			Online (Not applicable for NRI clients)				
Delivery Brokerage	Daily Volume	Intraday Brokerage	Delivery Brokerage	Intraday Brokerage			
0.50%	0-25 Lac	0.05%	0.3%	0.03%			
	25-50 Lac	0.04%					
	50 Lac - 1 Cr	0.035%					
	1 Cr & Above	0.03%					
*DERIVATIVE SEGMENT							
Stock Futures		Index Futures		Brokerage for physically settled equity derivatives shall be same as equity cash segment.			
0-25 Lac	0.05%	0-10 Lac	0.05%				
25-50 Lac	0.04%	10-50 Lac	0.04%	Futures	Options (Lot wise)	Currency	
50 Lac to 1 Cr	0.035%	50 Lac to 2 Cr	0.03%		Index		Stock
1 Cr & Above	0.03%	2 Cr to 5 Cr	0.025%	0.03%	Rs 50 per lot	Rs 75 per lot	Same as offline
		5 Cr and Above	0.02%				
Options (Lot wise)			Minimum Brokerage of Online trades.				
Intraday	Carry Forward		Rs 20/- per contract or 1 paise per share whichever is higher. Both subject to maximum of Rs 0.25 per share/debenture or 2.5% of the contract price per share/debenture whichever is higher.				
Rs 150 per lot	Rs 200 per lot						
Currency			In case the contract note is delivered by post then Rs 20/- per contract or 5 paise per share whichever is higher. Both subject to maximum of Rs 0.25 per share/debenture or 2.5% of the contract price per share/debenture whichever is higher.				
Instrument	Symbol	Brokerage per lot (Rs.)	Minimum Brokerage of derivative segment both offline and online trades.				
FUTCUR	EURINR	12.50 (applicable on both sides)					
FUTCUR	GBPINR	15.00 (applicable on both sides)	Rs 50/- per order for every off line order (executed) using the branch set up in Currency and F&O segment.				
FUTCUR	JPYINR	10.00 (applicable on both sides)					
FUTCUR & OPTCUR	USDINR	10.00 (applicable on both sides)	Both subject to maximum of 2.5% of premium amount or Rs 100 per lot for offline trade and Rs 50/75 per lot for online trade whichever is higher.				
The Brokerage for Interest Rate Futures segment (IRF) = 0.02% on the value of the contract.							
Minimum Brokerage of Offline trades.			Brokerage in Expiry/Exercise/ Assignment of Derivative contracts: Nil				
DCN + POA Clients: Rs.20 per order for every order (executed), Rs.20 per Scrip or 1 paise per share whichever is higher, round off to two decimal places.			SCHEDULE OF CHARGES FOR NRI CLIENTS: Separate sheet attached				
NON-DCN/NON-POA Clients: Rs.20 per order for every order (executed), Rs 30/- per scrip or 5 paise per share whichever is higher, round off to two decimal places.							
Contract wise Rs.30/- Minimum applicable to Rajasthan/ UP/Delhi/ Punjab/Gujarat/ WB/MP/Jammu & Kashmir states.							
Both subject to maximum of Rs 0.25 per share/debenture or 2.5% of the contract price per share/debenture whichever is higher.							
Geojit reserves the right to revise brokerage structure & other statutory charges as applicable under respective laws by display of the same on the trading website/customer care/direct communication. Old rate will be applicable for existing clients submitting this booklet as part of KYC updation.							

Statutory Charges (Applicable to Offline and Online Clients as the case may be)		*Miscellaneous Charges			
Securities Transaction Tax (STT)		SMS Alert Service (Trading Recommendations)		Rs 100/- per month	
		Printed Statement Request		Rs 50/- per request (through ordinary post)	
		Cheque Bounce/Cancellation		Rs 250/-	
		Interest on delayed Payments		18% per annum. Subject to change	
Delivery in Cash	0.10%	Interest on MTF debits		18% per annum. Subject to change	
Intraday in Cash only on selling side	0.025%	*Inter-Settlement Charges (For Clients who have Demat Account with Geojit)			
Futures only on selling side	0.01%	Regular Service Demat Account (RSDA)		Basic Service Demat Account (BSDA)	
Options only on selling side	0.05%	Electronic Communication	Physical Communication	Electronic Communication	Physical Communication
Sale of an option, where option is exercised	0.125%	0.02% subject to a minimum of Rs.15/- and maximum of Rs.40/- per transaction.	0.02% subject to a minimum of Rs.20/- and maximum of Rs.40/- per transaction.	0.05% subject to a minimum of Rs.50/- and maximum of Rs.75/- per transaction.	0.05% subject to a minimum of Rs.75/- and maximum of Rs.100/- per transaction.
Goods & Service Tax (GST)	18%	*Inter- Settlement Charges (For Clients who do not have Demat Account with Geojit)			
*Exchange Levy	As applicable from time to time	Who avail electronic communication		Who avail physical communication	
Stamp Duty		0.02% subject to a minimum of Rs.15/- and maximum of Rs.40/- per transaction.		0.02% subject to a minimum of Rs.20/- and maximum of Rs.40/- per transaction.	
*All charges are exclusive of taxes, Levies and other statutory charges					

To	To	To
Geojit Financial Services Ltd. 34/659-P Civil Line Road Padivattom Kochi-682 024	Bank Name HO Address	DP Name DP Division

Sub: Power of Attorney to operate Trading Account, Bank Account and Demat Account(s)

I/We _____ (name of the Trading Account Holder in case of individual, name of Karta in case of HUF and name of Company in case of Corporate) and _____ (name of the joint Account Holder(s) is / are partaking in the trading / investment facilities offered by Geojit and pursuant to the same, I am / We are desirous of conferring a Power of Attorney on Geojit to do various acts on my / our behalf for the disposal of balances in relation to the below mentioned Trading Account, Bank Accounts(s) and Demat Account(s) held singly/jointly be me/us.

Sl. No.	Account Type	Account No.	With
1	Trading Account		Geojit Financial Services Ltd.
2	Bank Account No.		_____ Branch of the _____ _____ (Bank Name)
3	Demat Account No.		_____ _____ _____ (DP Name) (DP ID: _____)

Please find enclosed the said Power of Attorney in favour of Geojit.

Name of
Account Holder : _____

Signature  (Full signature required)

Name of Joint
Account Holder : _____

Signature  (Full signature required)

Name of Joint
Account Holder : _____

Signature  (Full signature required)

(* Karta in case of HUF)

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POWER OF ATTORNEY FOR BROKING AND OTHER PRODUCTS & SERVICESTHIS **POWER OF ATTORNEY** MADE AT _____ THIS _____ DAY OF _____ 20__ BY:

1. _____ (name of the Account Holder),
aged _____ years and residing at _____
2. _____ (name of the Joint Account Holder),
aged _____ years and residing at _____
3. _____ (name of the Joint Account Holder),
aged _____ years and residing at _____

IN FAVOUR OF

Geojit Financial Services Limited, a company incorporated under the provisions of the Companies Act, 1956, (hereinafter referred to as "**Geojit** ") having its registered office at Civil Line Road, Padivattom, Kochi – 682024, which expression shall, unless repugnant to the context or meaning thereof, be deemed to mean and include its executors, administrators, successors and assigns by way of amalgamation and/or merger and registered as a stock broker of National Stock Exchange of India Ltd. (NSE) [SEBI registration number INZ 000104737 in the Capital Market Segment with CMBP ID IN506594 & Pool account number 10000004/IN300239, 1204890000000319, NSCCL(MFSS) 1100001100017837, NSCCL (MFSS) CMBP ID IN565576], BSE Ltd. [SEBI registration number INZ000104737 in the Capital Market Segment with CMBP ID IN603287 & Pool account number 10324155/IN300239, 1204890000000283], TM/CM-Client Securities Margin Pledge Account Number 16397916/IN300239, 1204890000434790, Client Securities under Margin Funding Account Number 16401229/IN300239, 1204890000434804, CM Client Securities Margin Pledge account number 1204890000432110, of the **Second Part**.

WHEREAS I/We hold single/jointly the following accounts.

Sl. No.	Account Type	Account No.	With
1	Trading Account		Geojit Financial Services Ltd.
2	Bank Account No.		_____ Branch of the _____ _____ (Bank Name)
3	Demat Account No.		_____ _____ (DP Name) (DP ID: _____)

(hereinafter referred to as the "Designated Accounts") and wish to participate in the trading, investment and other services offered by Geojit.

 (Full signature required)
Account Holder

 (Full signature required)
Joint Account Holder

 (Full signature required)
Joint Account Holder

WHEREAS as a consideration for providing various facilities and services and to facilitate proper execution of all transactions, including but not limited to, transactions for purchase, sale, investment of shares & securities, scrips, stocks, derivatives, including but not limited to, forwards, futures and options, or sale of or application for any offer or public issue of shares, and to sell securities in my/our behalf in any buy back or open offers made by the issuers of such securities or to make applications in my/our name and on my/our behalf for availing of margin trading facility, and/or for making investments (hereinafter referred to as 'purpose') I/We am/are desirous of appointing Geojit as my/our attorney and confer upon it the powers hereinafter stated.

THEREFORE, THIS POWER OF ATTORNEY WITNESSETH that I/We hereby nominate, appoint and constitute Geojit as my/our true and lawful attorney to do, execute and perform or cause to be done, executed and performed, the following acts, deeds and things or any of them for and on my/our behalf namely:

AUTHORISATION TO Geojit:

1. To operate, block and/or debit the Designated Accounts as per my/our instructions to Geojit furnished in any manner acceptable to Geojit to meet all my/our obligations for trading transactions done on the National Stock Exchange (NSE) and the Bombay Stock Exchange Ltd (BSE), and to give other instructions relating to the Designated Accounts for any matter concerning the above mentioned Purpose, including charges for Account Opening and availing of various services and facilities from Geojit. In the event the Bank Account which is integrated with my/our Demat Account(s) with the Depository Participant and the trading account with Geojit for carrying out transactions in connection with the Purpose is closed or transferred, for any reason whatsoever, this POA shall be deemed to extend to any subsequent change of the bank account number and/or in case an inter-branch transfer of the bank account is effected in future. Such a change/transfer shall be informed to the POA holder (Geojit) in advance by me/us.
2. To credit the Designated Accounts with monies/securities due to me/us.
3. To debit my/our Designated Accounts towards monies/securities/fees/charges etc. due to Geojit, and Depository Participant and to discharge all obligation in this regard on my/our behalf to Geojit and Depository Participant.
4. To debit/credit my/our Bank Account(s) towards monies/fees/charges etc. payable to Geojit and Depository Participant by virtue of I/We using/subscribing to any of the facilities/services provided either by Geojit, Bank and or Depository Participant.
5. To make application for investment products including but not limited to insurance policies etc., as may be instructed to be applied for me/us and to do all things necessary which are incidental availing investment products by me/us including but not limited to pledging of scrips, stocks, securities, bonds, debentures, mutual fund units, units of any collective investment scheme or any other security or financial instrument on behalf of me/us through Geojit.
6. To do all such acts, deeds and things as may be necessary for or incidental to provision of services and facilities to me/us, including giving intimations, confirmation, undertaking etc. on my/our behalf.
7. To retain all originals of documents executed by me/us.
8. To enter and to include our names in the relevant application forms, new IPOs that are being submitted for the purposes stated herein and we fully agree to such naming or making applications in our names in the requisite forms and further agree to hold Geojit or its office bearers and nominees harmless in any related queries by any authorities or Regulators and also not to raise any claim or dispute against Geojit or nominees for such filling up / applying with our names and making applications. We further agree to abide by all norms and laws of SEBI or such other regulators.
9. To sell or otherwise deal with or dispose of and to purchase, subscribe or otherwise acquire in any manner

 (Full signature required)
Account Holder

 (Full signature required)
Joint Account Holder

 (Full signature required)
Joint Account Holder

from the market or under public or rights issues or otherwise and accept the transfers of any stocks, funds, shares, debentures, Government and other promissory notes, securities, bonds, debentures, annuities or other mercantile negotiable instruments which shall or may at any time belong to me or which hereafter be transferred to me, whether solely or jointly and whether in my own right or having any other interest of whatsoever nature and however arising and in any capacity whatsoever including those belonging to others with my name and for such purposes to sign, execute or endorse all instruments of transfer and other documents for any purpose whatsoever by the virtue of these present.

10. This POA is executed upon the firm understanding received from Geojit that, Geojit would return the securities or funds that would have been received by Geojit erroneously or without authority from me/us.

11. And generally to do or cause to be done every other acts, deeds, matter or things, as Geojit may deem necessary or expedient for the purpose of or in relation to these presents.

We hereby declare that all and every receipts made, executed or done for the aforesaid Products and Services by virtue of these presents shall be as good, valid and effectual to all intents and purposes whatsoever as if the same had been made, executed or done by us in our own name(s).

12. It is specifically made clear herein that this Power of Attorney shall be cancelled or revoked at any time without any advance notice from my/our side, however those obligations arising before such cancellation shall be carried out by Geojit, for which I/We shall not raise any objection or claims whatsoever.

13. It is also made clear hereby that, by virtue of me/us executing this Power of Attorney, Geojit may send a consolidated summary of my/our scrip wise buy and sell positions taken with average rates by way of an SMS/ E-mail on a daily basis, in addition to the standard documents being received from Geojit.

I/We hereby declare that all and every receipt made, executed or done for the aforesaid purposes by virtue of these presents shall be as good, valid and effectual for all intents and purposes whatsoever as if the same had been made, executed or done by me/us in my/our own name(s).

I/We hereby ratify and confirm and agree to ratify and confirm all that Geojit or any of its Officer or Officers shall do or cause to be done in or concerning the premises by virtue of these presents.

IN WITNESS WHEREOF I/We have hereunto set and subscribed our respective hands at _____

_____ on this _____ day of _____ 20_____

Name of Account Holder		Signature  (Full signature required)
Name of Joint Account Holder		Signature  (Full signature required)
Name of Joint Account Holder		Signature  (Full signature required)

(* Karta in case of HUF)

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To	To	To
Geojit Financial Services Ltd. 34/659-P Civil Line Road Pativattom Kochi-682 024	Bank Name HO Address	DP Name DP Division

Sub: Power of Attorney to operate Trading Account, Bank Account and Demat Account(s)

I/We _____ (name of the Trading Account Holder in case of individual, name of Karta in case of HUF and name of Company in case of Corporate) and _____ (name of the joint Account Holder(s) is / are partaking in the trading / investment facilities offered by Geojit and pursuant to the same, I am / We are desirous of conferring a Power of Attorney on Geojit to do various acts on my / our behalf for the disposal of balances in relation to the below mentioned Trading Account, Bank Account(s) and Demat Account(s) held singly/jointly be me/us.

Sl. No.	Account Type	Account No.	With
1	Trading Account		Geojit Financial Services Ltd.
2	Bank Account No.		_____ Branch of the _____ _____ (Bank Name)
3	Demat Account No.		_____ _____ _____ (DP Name) (DP ID: _____)

Please find enclosed the said Power of Attorney in favour of Geojit.

Name of
Account Holder : _____

Signature  (Full signature required)

Name of Joint
Account Holder : _____

Signature  (Full signature required)

Name of Joint
Account Holder : _____

Signature  (Full signature required)

(* Karta in case of HUF)

– Intentionally left blank –

POWER OF ATTORNEY FOR BROKING AND OTHER PRODUCTS & SERVICESTHIS **POWER OF ATTORNEY** MADE AT _____ THIS _____ DAY OF _____ 20____ BY:

1. _____ (name of the Account Holder),
aged _____ years and residing at _____

2. _____ (name of the Joint Account Holder),
aged _____ years and residing at _____

3. _____ (name of the Joint Account Holder),
aged _____ years and residing at _____

IN FAVOUR OF

Geojit Financial Services Limited, a company incorporated under the provisions of the Companies Act, 1956, (hereinafter referred to as "**Geojit** ") having its registered office at Civil Line Road, Padivattom, Kochi – 682024, which expression shall, unless repugnant to the context or meaning thereof, be deemed to mean and include its executors, administrators, successors and assigns by way of amalgamation and/or merger and registered as a stock broker of National Stock Exchange of India Ltd. (NSE) [SEBI registration number INZ 000104737 in the Capital Market Segment with CMBP ID IN506594 & Pool account number 10000004/IN300239, 1204890000000319, NSCCL(MFSS) 1100001100017837, NSCCL (MFSS) CMBP ID IN565576], BSE Ltd. [SEBI registration number INZ000104737 in the Capital Market Segment with CMBP ID IN603287 & Pool account number 10324155/IN300239, 1204890000000283], TM/CM-Client Securities Margin Pledge Account Number 16397916/IN300239, 1204890000434790, Client Securities under Margin Funding Account Number 16401229/IN300239, 1204890000434804, CM Client Securities Margin Pledge account number 1204890000432110, of the **Second Part**.

WHEREAS I/We hold single/jointly the following accounts.

Sl. No.	Account Type	Account No.	With
1	Trading Account		Geojit Financial Services Ltd.
2	Bank Account No.		_____ Branch of the _____ _____ (Bank Name)
3	Demat Account No.		_____ _____ (DP Name) (DP ID: _____)

(hereinafter referred to as the "Designated Accounts") and wish to participate in the trading, investment and other services offered by Geojit.

 (Full signature required)
Account Holder

 (Full signature required)
Joint Account Holder

 (Full signature required)
Joint Account Holder

WHEREAS as a consideration for providing various facilities and services and to facilitate proper execution of all transactions, including but not limited to, transactions for purchase, sale, investment of shares & securities, scrips, stocks, derivatives, including but not limited to, forwards, futures and options, or sale of or application for any offer or public issue of shares, and to sell securities in my/our behalf in any buy back or open offers made by the issuers of such securities or to make applications in my/our name and on my/our behalf for availing of margin trading facility, and/or for making investments (hereinafter referred to as 'purpose') I/We am/are desirous of appointing Geojit as my/our attorney and confer upon it the powers hereinafter stated.

THEREFORE, THIS POWER OF ATTORNEY WITNESSETH that I/We hereby nominate, appoint and constitute Geojit as my/our true and lawful attorney to do, execute and perform or cause to be done, executed and performed, the following acts, deeds and things or any of them for and on my/our behalf namely:

AUTHORISATION TO Geojit:

1. To operate, block and/or debit the Designated Accounts as per my/our instructions to Geojit furnished in any manner acceptable to Geojit to meet all my/our obligations for trading transactions done on the National Stock Exchange (NSE) and the Bombay Stock Exchange Ltd (BSE), and to give other instructions relating to the Designated Accounts for any matter concerning the above mentioned Purpose, including charges for Account Opening and availing of various services and facilities from Geojit. In the event the Bank Account which is integrated with my/our Demat Account(s) with the Depository Participant and the trading account with Geojit for carrying out transactions in connection with the Purpose is closed or transferred, for any reason whatsoever, this POA shall be deemed to extend to any subsequent change of the bank account number and/or in case an inter-branch transfer of the bank account is effected in future. Such a change/transfer shall be informed to the POA holder (Geojit) in advance by me/us.
2. To credit the Designated Accounts with monies/securities due to me/us.
3. To debit my/our Designated Accounts towards monies/securities/fees/charges etc. due to Geojit, and Depository Participant and to discharge all obligation in this regard on my/our behalf to Geojit and Depository Participant.
4. To debit/credit my/our Bank Account(s) towards monies/fees/charges etc. payable to Geojit and Depository Participant by virtue of I/We using/subscribing to any of the facilities/services provided either by Geojit, Bank and or Depository Participant.
5. To make application for investment products including but not limited to insurance policies etc., as may be instructed to be applied for me/us and to do all things necessary which are incidental availing investment products by me/us including but not limited to pledging of scrips, stocks, securities, bonds, debentures, mutual fund units, units of any collective investment scheme or any other security or financial instrument on behalf of me/us through Geojit.
6. To do all such acts, deeds and things as may be necessary for or incidental to provision of services and facilities to me/us, including giving intimations, confirmation, undertaking etc. on my/our behalf.
7. To retain all originals of documents executed by me/us.
8. To enter and to include our names in the relevant application forms, new IPOs that are being submitted for the purposes stated herein and we fully agree to such naming or making applications in our names in the requisite forms and further agree to hold Geojit or its office bearers and nominees harmless in any related queries by any authorities or Regulators and also not to raise any claim or dispute against Geojit or nominees for such filling up / applying with our names and making applications. We further agree to abide by all norms and laws of SEBI or such other regulators.
9. To sell or otherwise deal with or dispose of and to purchase, subscribe or otherwise acquire in any manner

 (Full signature required)
Account Holder

 (Full signature required)
Joint Account Holder

 (Full signature required)
Joint Account Holder

from the market or under public or rights issues or otherwise and accept the transfers of any stocks, funds, shares, debentures, Government and other promissory notes, securities, bonds, debentures, annuities or other mercantile negotiable instruments which shall or may at any time belong to me or which hereafter be transferred to me, whether solely or jointly and whether in my own right or having any other interest of whatsoever nature and however arising and in any capacity whatsoever including those belonging to others with my name and for such purposes to sign, execute or endorse all instruments of transfer and other documents for any purpose whatsoever by the virtue of these present.

10. This POA is executed upon the firm understanding received from Geojit that, Geojit would return the securities or funds that would have been received by Geojit erroneously or without authority from me/us.

11. And generally to do or cause to be done every other acts, deeds, matter or things, as Geojit may deem necessary or expedient for the purpose of or in relation to these presents.

We hereby declare that all and every receipts made, executed or done for the aforesaid Products and Services by virtue of these presents shall be as good, valid and effectual to all intents and purposes whatsoever as if the same had been made, executed or done by us in our own name(s).

12. It is specifically made clear herein that this Power of Attorney shall be cancelled or revoked at any time without any advance notice from my/our side, however those obligations arising before such cancellation shall be carried out by Geojit, for which I/We shall not raise any objection or claims whatsoever.

13. It is also made clear hereby that, by virtue of me/us executing this Power of Attorney, Geojit may send a consolidated summary of my/our scrip wise buy and sell positions taken with average rates by way of an SMS/ E-mail on a daily basis, in addition to the standard documents being received from Geojit.

I/We hereby declare that all and every receipt made, executed or done for the aforesaid purposes by virtue of these presents shall be as good, valid and effectual for all intents and purposes whatsoever as if the same had been made, executed or done by me/us in my/our own name(s).

I/We hereby ratify and confirm and agree to ratify and confirm all that Geojit or any of its Officer or Officers shall do or cause to be done in or concerning the premises by virtue of these presents.

IN WITNESS WHEREOF I/We have hereunto set and subscribed our respective hands at _____

_____ on this _____ day of _____ 20_____

Name of Account Holder		Signature  (Full signature required)
Name of Joint Account Holder		Signature  (Full signature required)
Name of Joint Account Holder		Signature  (Full signature required)

(* Karta in case of HUF)

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DECLARATION

The terms and conditions pertaining to the Online Trading Account, Bank Account & Demat Account that is in force now, have been read by me/us. I/We have understood the same and I/We agree to abide by and to be bound by the rules as are in force from time to time for such accounts.

I/We also declare that the particulars given by me/us are true to the best of my/our knowledge as on the date of making such application. I/We further agree that any false /misleading information given by me/us or suppression of any material fact will render my/our account liable for termination and further action.

I/We agree to pay the charges as per the Schedule of Charges attached to the Form and any revision thereof from time to time and understand that my/our opening of the Online Trading Account is subject to the payment of these charges. I/We confirm that First holder is the sole signatory or authorised to act alone where the accounts are in the joint names. I/We understand that in case the Demat Account is closed during the year, no pro-rata refund of annual charges will be made. I/We authorize the Bank/DP to receive credits automatically into my/our Bank/Demat Account(s).

I/We agree and confirm that I/We have read the terms and conditions of the account facility, and the terms and conditions pertaining to usage of channels for access of the said account facility and am/are aware of and will adhere to all the terms/conditions of opening/maintaining of the said account and usage of the channels with/by the Bank as may be in force from time to time.

I/We further declare that I/We have read and am/are aware of and will adhere to the rules of the Depository in relation to maintenance and operation of the account.

I/We understand that certain particulars given by me/us are required by the operational guidelines governing the respective companies.

We, the joint applicants hereby confirm that we have instructed and authorised the Online Trading Account holder to view/access that information on the said account for and on behalf of all of the undersigned and under our specific instructions as stated in this letter. We hereby state that should we wish to revoke the above authorisation, we shall duly issue a letter of revocation to the Bank and to Geojit Financial Services Ltd. in this regard. We hereby agree that until ten days after the Bank and Geojit Financial Services Ltd. receives such letter revoking the above mandate, the authorisation as afore stated shall hold good (Applicable in case of Joint Applicants).

I/We declare, confirm and agree:

- a. that all the particulars and information given in the Application form are true, correct, complete and up to date in all respects and I/We have not withheld any information.
- b. that I/We confirm that I/We have had no insolvency initiated against me/us nor have I/We ever been adjudicated insolvent.
- c. that I/We have read the application form and brochures and am/are aware of all the terms and conditions of availing the said services from the Bank and Geojit Financial Services Ltd. and its Group Companies.
- d. that Geojit Financial Services Ltd., the Bank and its Group Companies reserve the right to reject any application without providing any reason.
- e. I/We declare and confirm that I/We are not member(s) of the National Stock Exchange of India Ltd or Bombay Stock Exchange. I/We undertakes that we shall not execute trades through Geojit Financial Services Ltd. on NSE or BSE if I/We become members of the respective stock exchange(s)

I/We agree, undertake and authorise:

- a. Geojit Financial Services Ltd., Bank and its Group companies or their agents to make references and enquires relative to information in this application which Geojit Financial Services Ltd., Bank and its Group Companies or their agents consider necessary.
- b. to inform Geojit Financial Services Ltd., Bank and its Group Companies regarding change in my/our residence/employment and to provide any further information that Geojit Financial Services Ltd., Bank and its Group Companies may require from time to time.
- c. I/We agree and hereby authorise Geojit Financial Services Ltd / Bank Ltd /its Group Companies and their agents to exchange, share or part with all the information, data or documents relating to my/our application and

transaction information to other Group Companies/Banks/Financial institutions/Credit Bureaus/ Agencies / Statutory Bodies / such other persons as Geojit Financial Services Ltd / Bank / its Group Companies may deem necessary and / or appropriate as may be required for use or processing of the said information / data by such person/s or furnishing of the processed information / data / products thereof to other Banks / Financial Institutions / credit providers / agencies / users registered with such persons and I/We shall not hold Geojit Financial Services Ltd / Bank / its Group Companies and other persons to whom such information etc is disclosed liable for the disclosure or use of such information.

I/We hereby confirm this Bank account will be operated singly and in case of joint account operated by either or survivor.

I/We confirm that the Bank account to be opened with Online Trading Account be used for the purpose of all cash corporate actions.






I/We, the joint holder/s, hereby authorise the Online Trading Account holder, to access the internet Banking, Phone Banking and Mobile Banking channels as provided for viewing of and transaction from the Accounts and the Online Trading account holder confirms the said appointment. I/We, the joint holder/s, hereby state that should I/ We, joint holder/s wish to revoke the above authorisation, I/We joint holder/s, shall duly issue a letter of revocation ("the revocation letter") to the Bank and to Geojit Financial Services Ltd. in this regard.

The rules and regulations of the Depository and Depository Participants, pertaining to an account which are in force now have been read by me/us and I/We have understood the same and I/we agree to abide by and to be bound by the rules as are in force from time to time for such accounts. I/We also declare that the particulars given by me/us are true to the best of my/our knowledge as on the date of making such applications. I/We further agree that any false/misleading information given by me/us or suppression of any material fact will render my account liable for termination and further action.

I/We agree and understand that I/We have to complete further applications for specific liability products/services from (Bank Name)/its Group Companies, as prescribed from time to time, and that such further applicants shall be regarded as an integral part of this application (and vice versa), and that unless otherwise disclosed in such further forms as prescribed, the particulars and information set forth herein as well as the documents referred or provided herewith are true, correct, complete and up to date in all respects. I/We agree and understand that such further applications will require incorporation of the application form number, and/or such details as the Bank may prescribe, to facilitate data management.

"I/We understand that as on date, Geojit Financial Services Ltd. does clientele business only and there is no proprietary trading except on a few occasions to test its system functionalities".

Note: Please sign in Black ink within the box.

	Name(s) of holders	Signature(s)
Online Trading Account Holder (Applicant)		 (Full signature required)
FOR BANK ACCOUNT		
Joint Holder A		 (Full signature required)
Joint Holder B		 (Full signature required)
FOR DEMAT ACCOUNT (To be used if the Cc-Holders are different from that of Bank Account)		
Co-holder A		 (Full signature required)
Co-holder B		 (Full signature required)

LETTER OF CONFIRMATION

To,

Geojit Financial Services Limited
34/659-P, Civil Line Road, Padivattom, Kochi - 682 024, Kerala.

..... (Bank Name)

..... (Address)

.....

Dear Sirs,

Sub: Opening of a CLIENT Online Trading Account for investments and trading in securities and derivatives.

I/We refer to my/our application for opening of a CLIENT Online Trading Account ("CLIENT Account") with Geojit Financial Services Limited (hereinafter called "Geojit") and receipt of the Rights & Obligations and additional Rights & Obligations documents for broking and other products/services as prescribed by SEBI and duly acknowledged vide the Declaration executed with us (hereinafter 'CLIENT Declaration') in connection therewith.

Further, I/We here by agree and confirm that:

1. I/we (hereinafter referred to as "the CLIENT") shall be entitled to transact in such Securities and Derivative products as are introduced by Geojit on the online trading portal. These transactions shall include but shall not be limited to transactions for the purchase or sale or an order for the purchase or sale of or an application for any offer or public issue of shares, scrips, stocks, securities, bonds, debentures, Financial instrument, derivatives or contracts in derivatives admitted for trading on the Derivative Market Segment of the Exchange or services that Geojit may in its absolute discretion introduce or offer from time to time (hereinafter referred to as "Investment Products").
2. The CLIENT shall ensure that the transactions through Geojit are executed in accordance with the applicable laws, byelaws, rules and regulations governing the specific Investment Products. Geojit may from time to time impose and vary limits on the orders which the CLIENT/s may place, including exposure limits, turnover limits, limits as to numbers etc. The CLIENT/s agree that Geojit shall not be responsible for any variation or reduction that may be deemed necessary by Geojit based on its risk perception and other relevant factors.
3. The CLIENT agrees that Geojit is entitled to disclose to a third party, all such information pertaining to the CLIENT as may be required from time to time, for the CLIENT to be able to apply/avail of any or all of the Investment Products mentioned above and/or for the purpose of applying / availing Credit Facility in terms of Clause 2 above.
4. The CLIENT expressly authorises Geojit/Bank to block the amount required to settle the obligation of the CLIENT against the desired limits and in case of the execution of the order, either in part or in full debit the CLIENT's Investment/Bank Account to the extent necessary to settle the obligations and credit Geojit's Account. The CLIENT agrees that CLIENT shall not be permitted to withdraw, issue a cheque or otherwise use the blocked and/or allocated funds in his Investment / Bank Account. The Bank reserves all its right to dishonour their instruction / Cheque that may be issued against the blocked amount. The CLIENT also understands and agrees that blocking of funds against their order will be given priority over all other instructions or cheques given by either the CLIENT or his authorised representative.
5. The CLIENT agrees that Geojit and the Bank may enforce any of the rights, duties and obligation arising under this Letter or any related document including the Power of Attorney either jointly or independently, and nothing in this Letter shall be construed in a manner so as to restrict the right of Geojit and the Bank to initiate any action jointly.
6. The CLIENT agrees that in case the CLIENT has applied for shares in an Initial Public Offer / Public Offer through Geojit, the CLIENT shall not, without prior intimation and acknowledgment of Geojit, liaise with the

Registrar for the Initial Public Offer/Public Offer to change the details of the Demat Account, bank account and the Address on the Application Form provided to the Registrar by Geojit. The CLIENT further authorized Geojit to give standing instructions to the Registrar to reject such requests from the CLIENT. In event of any change in the details of the Demat Account, bank Account, Address of the CLIENT, etc., the CLIENT shall first update such changes with Geojit who shall liaise with the Registrar to update such changes and accordingly the refunds/allotments on the Applications shall be made. The CLIENT agrees that Geojit is hereby authorized to give instructions to the Depository Participant of the CLIENT to reject any request received from the CLIENT for changing the Bank Account details or updating any change relating to the Demat Account. The CLIENT further agrees that the CLIENT shall not close the Demat Account/Bank Account without prior notification to Geojit where an Application for initial Public Offer / Public Offer has been made on behalf of the CLIENT through Geojit and the CLIENT agrees that Geojit may Instruct the Depository Participant/Bank of the CLIENT to reject any such request received from the CLIENT.

In case an application is made for Initial Public Offer/Public Offer through Geojit, the CLIENT authorizes Geojit to collect on Client's behalf, the refund amount, if any, from the Company/Registrar and subsequently credit the same to CLIENT's Bank Account after set-off/adjustment of dues payable by the CLIENT on account of obligations incurred in connection with the application.

The CLIENT further agrees that Geojit shall be held responsible for non allotment of securities either fully or partly to the CLIENT, for any reason whatsoever Geojit shall not be held responsible in case due to some reason the bid/application/revision instruction sent by the CLIENT is not received by it, or if the bid/application/revision could not be uploaded to the Stock Exchange, or could not be sent to the Banker/Registrar to the issue Geojit shall not be held responsible for non receipt or delay in the correct receipt of refunds, if any, from the Registrar / Company. Geojit shall not be held responsible for incorrect Tax deduction at Source (TDS) by the Registrar / Company, if applicable, or for non receipt or delay in/incorrect receipt of TDS certificate, if any, from the Registrar/Company.

The CLIENT agrees that the aforesaid Power of Attorney executed by the CLIENT in favour of Geojit and the instructions provided by the CLIENT shall be treated as extending to making of the application for Initial Public Offer / Public Offer on behalf of the CLIENT, and further that Geojit may furnish certified copy of the Power of Attorney and other documents on behalf of the CLIENT to the Company / Registrar / any third party.

1. The CLIENT hereby opts to receive the contract notes for the trades executed for him/her, in an electronic form i.e. digitally signed contract notes. If the CLIENT does not wish to receive the contract notes in electronic format in future he/she will confirm the same in writing to the trading member.
2. Geojit shall cause to be displayed on the Website, the Terms and Conditions governing the purchase, sale or any other transactions in each of the Investment Products as and when they are introduced. Provided that Geojit shall be entitled to modify/alter the said Terms and Conditions and such a change shall be displayed on the Website so as to intimate such modifications / alteration to the CLIENT. The continued use of the Website by the CLIENT shall be deemed to be an acceptance by the CLIENT of the modified / altered Terms and Conditions.
3. The CLIENT hereby agrees to indemnify Geojit and the bank against any loss (actual or notional), costs, expenses etc, which may be suffered by Geojit and/or the Bank and their Group Companies, or against by claim, demand, action or proceeding that may be initiated against Geojit and/or the Bank, in connection with this Letter or non compliance of any applicable rules and regulations or arising out of or in connection with due to a breach of any of the CLIENT obligations under the CLIENT Declaration and/or this Letter.
4. Geojit and or the Bank may at any time amend this Letter of confirmation, by modifying or rescinding any of the existing provisions or conditions or by adding any new provision or condition, by conspicuously posting notice of such amendment or the amended text of the letter of Confirmation on the Website or by providing notice to CLIENT in writing or by an email. The continued use of Geojit's services after such notice shall constitute acknowledgment and acceptance of such amendment. Certain policies, and/or procedures may be further outlined on the Geojit's Website, if any, and by the CLIENT's use of the Website and services, the CLIENT agrees to be bound by any and all such postings.
5. The CLIENT shall not assign any right and obligations hereunder without first obtaining the prior written consent by an authorized officer of Geojit. Geojit and the Bank, may, however, assign their rights and obligations to any third person without the prior consent of the CLIENT.

6. The CLIENT agrees that the CLIENT would be able to exercise the right to close/freeze any of the accounts with Geojit only if there is no obligation pending to be met by the CLIENT in favour of either Geojit or towards any other third party through Geojit in any form.
7. The invalidity or unenforceability of any provisions of this Letter in any jurisdiction shall not affect the validity, legality or enforceability of the remainder of this Letter in such jurisdiction or the validity, legality or enforcement of this Letter, including any such provision, in any other jurisdiction, it being intended that a rights and obligations of the Parties hereunder shall be enforceable to the fullest extent permitted by law.
8. The CLIENT agrees that Geojit and/or the Bank may forthwith terminate this Letter of Confirmation by giving a notice to the CLIENT or posting the notice on the Website.
9. The CLIENT agrees that in event the CLIENT desires to terminate this letter of confirmation executed by the CLIENT in favour of Geojit and the Bank, the CLIENT shall give written notice to Geojit and the Bank of its intention to so do, at least 30 (thirty) days in advance and shall obtain written acknowledgment of the receipt of the notice from Geojit and the Bank. Such termination shall not have any effect on the transactions executed before the date of such notice of termination and the parties shall enjoy the same rights and shall have the obligations in respect of such transactions.
10. Any legal action or proceedings arising out of this Letter shall be brought in the courts or tribunals at Kochi in India and the CLIENT irrevocably submits to the exclusive jurisdiction of such courts and tribunals Geojit and/or Bank may, however, in their absolute discretion, commence any legal action or proceedings arising out of these terms and conditions in any other court, tribunal or other appropriate forum, and the CLIENT hereby consents to that jurisdiction.

I/We further confirm that the above testimonies are in addition to those confirmations given by me/us in the account opening form for opening the CLIENT account.

Place:.....

Date:.....

<div data-bbox="103 1376 399 1410"> (Full signature required)</div> <div data-bbox="118 1449 480 1483">In confirmation of the above</div>
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RUNNING ACCOUNT AUTHORISATION

I maintaining a trading account with Geojit Financial Services Ltd. hereby authorise Geojit Financial Services Ltd. 34/659 – P, Civil Line Road, Padivattom, Kochi – 682 024 to operate my account on Running account basis.

I hereby authorise Geojit for the following with regard to my trading account for transactions in the Commodities/Securities markets that I have opted for and where Geojit continues holding membership.

1. To effect transfer of my credit balances in one exchange segment to the ledger or the credit of same and/or other exchange as may be applicable to meet the margin and/or settlement obligations on my accounts as necessitated.

I hereby declare that I have read and understood the general guidelines issued by exchanges to members on releasing funds and collateral payouts. However, being fully aware of the same, I have authorised Geojit to retain / utilise credits as mentioned above, for operational convenience.

2. To retain settlement credits in my account to settle/ release the credits or any such amount only on receipt of specific advice/instruction that can either be oral or in writing. The above is applicable to funds and collateral. On request, geojit shall transfer funds lying in credit with geojit within one working day, and collateral within three working days.
3. To retain and utilise the financial ledger credits (amounts) towards my obligations arising of trades executed through Geojit at any exchange – segment in my account. To retain and utilise the collateral towards my trading limits and margin obligations arising of trades executed through Geojit at any Exchange segment in my account. I understand herein that Geojit shall retain the absolute discretion on the acceptable list / mode of collaterals alongside the applicable haircut on them.
4. I understand that in respect of any derivative market transaction, apart from margin liability as on the date

of settlement, trading member may retain additional margins (maximum upto the percentage prescribed under the prevailing guidelines as per Exchanges / SEBI) to take care of any margin obligation arising in next days.

5. I authorise Geojit to retain a sum of Rs.10000 (net amount across segment and across stock exchanges) to address the administrative / operational difficulties in settling my account. In case there is no trading transaction during the month or quarter, as the case may be, funds will be fully settled.
6. I have opted to have settlement of funds and collaterals on a periodic basis and not to have a contract wise / bill wise / settlement wise transfer of funds between me and Geojit.
7. I am aware of my account is maintained on a Running account basis. The actual settlement of funds and collateral shall however be done by Geojit, at least once at such periodicity as prescribed by the Exchanges / SEBI.
8. This authorisation will be valid until it is revoked by me. I understand that the revocation of authorization shall be applicable immediately on receipt of request by Geojit at Head Office. It is understood that my account would be operated on a contract wise / bill wise / settlement wise basis and all rights and obligations shall be applicable accordingly, once the authorisation is revoked.
9. I we shall not make any claim whatsoever upon Geojit for Geojit standing guided by this authorisation in favour of maintaining my account on Running Account basis.
10. I shall prefer settlement of funds/collateral once in a calendar quarter ☐ or a calendar month ☐ [tick any one]. Such settlement will be done by Geojit on any day its discretion in a calendar month or quarter as the case may be.

 (Full signature required)

Name and Signature of the Client

Date.....

NRI UNDERTAKING FOR NRE PIS ACCOUNT

To,
Geojit Financial Services Ltd.
34/659-P, Civil Line Road, Padivattom, Kochi-682024.

Sub: Submission of contract note to PIS Bank

Dear Sir,

I, Mr./Ms., aged, S/D/W/
of, residing at.....
.....hereby agree and undertakes as follows:

1. Whereas I have registered with M/s. Geojit Financial Services Ltd, 34/659-P, Civil Line Road, Padivattom, Kochi-682 024, as an NRI client a per the agreement executed on To be able to trade on the Indian Stock Exchanges.
2. Whereas the Securities and Exchange Board of India (SEBI) and the Reserve Bank of India (RBI) have promulgated special rules and regulations applicable to NRIs who trade on Indian Stock Exchanges.

I hereby agree and undertake the following:

3. I agree to submit the Contract notes to my Bank Branch, within 24 hrs of said trades.
4. I understand and agree to abide by the SEBI/RBI rule that prohibit me from short-selling securities and netting of trades.
5. I understand and agree to abide by the RBI regulation which requires that my PIS bank account be fully pre-funded. I undertake to always ensure that my PIS bank account tied to my trading account will have clear credit balance to cover the combined value of the stock/s to be purchased brokerage and all applicable statutory charges before executing trades.
6. I undertake to abide by all other rules applicable to my trading in the Indian Stock Exchanges as an NRI, either existing or enjoined at a later date.
7. In the event of my committing a breach of any of the above described regulations, Geojit shall be at liberty to deactivate my trading account and I shall not raise any claim or dispute against Geojit Financial Services Ltd., for the said action.

Place.....

 (Full signature required)

Date.....

(Name & Signature of the Client / Authorised Signatory)

FOR NRO NON-PIS CLIENTS**NRI UNDERTAKING - INVESTING UNDER NON - REPATRIATION BASIS**

To,
 Geojit Financial Services Ltd.
 34/659-P Civil Line Road, Padivattom
 Kochi - 682024.

Sub: Undertaking as an NRI trading under NRO status

Dear Sir

I, Mr./Ms. aged

S/D/W of residing at

here by agree and undertake as follows:

1. Whereas, I have registered with M/s Geojit Financial Services Ltd., 34/659-P, Civil Line Road, Padivattom, Kochi -682024 as an NRI Client under NRO status(Non – Repatriation basis)as per the KYC Terms and Conditions & Rights and Obligations executed on to trade on the Stock Exchanges in India.
2. Whereas, the Securities and Exchange Board of India (SEBI) and Reserve Bank of India (RBI) have promulgated special rules and regulations applicable to NRIs who trade on Indian Stock Exchanges.
3. I affirm and agree to abide by the SEBI/RBI rules that prohibit short -selling securities and netting of trades.
4. I affirm and agree that the Sale / Maturity proceeds of the securities or units acquired shall be credited to my NRO account irrespective of the type of account from which the considerations for acquisition were paid.
5. I affirm and agree that the amount invested under this scheme and the capital appreciation thereon shall not be allowed to be repatriated abroad under any circumstances.
6. I affirm and agree that Geojit shall calculate and deduct the applicable taxes as per the prevailing tax norms in India and shall pay only the net amount after taxes to my NRO account for which TDS certificate shall be issued.
7. I shall intimate Geojit and give a suitable declaration of the cost and date of purchase of the securities held by me.
8. Further, I shall intimate Geojit about any change in the status of security holdings on account of corporate actions or otherwise (IPO/FPO, Rights, Buy back, ESOPs, off market transfers etc) to facilitate proper capital gains computations.
9. I shall, on demand, provide the proof of cost and date of acquisition of the shares so declared. Geojit shall have the right to disallow selling of shares for which I have not given complete declaration.
10. I understand and agree that Geojit can outsource the tax calculations and other related activities to a third party who may have access to my account/transactions besides levy service charges for providing such services.
11. I undertake and agree that I shall be entirely liable for any tax liabilities that arise on account of the transactions executed through Geojit and that I shall cooperate with Geojit in this regard.
12. I undertake and agree to pay in full all the dues, losses, liabilities, charges, taxes, fees, interest, penalty, fine, etc. that may arise on account of my trading activities with Geojit.
13. I undertake to abide by all the applicable rules, regulations, laws, notifications, circulars under FEMA, RBI, SEBI, Income Tax, government, ministries, etc.for NRO trading in the Stock Exchanges in India as an NRI, existing or as announced from time to time.
14. In the event of my committing a breach of any of the above described regulations, Geojit shall be at liberty to deactivate my NRO trading account and I shall not raise any claim or dispute against Geojit , for the said action.
15. I undertake and agree that in case I do not opt for receiving contract notes and other communications via email or in case where I have opted for receiving contract notes and other communication by email but Geojit is unable to send the same by email (where the reason is beyond Geojits control) the additional charges applicable for sending contract notes/other communication in physical form, additional Demat AMC charges as well as any other related charges will be applied to my account.

Place:

 (Full signature required)

(Name & Signature of the Client/ Authorised Signatory)

Date:

DECLARATION NON-REPATRIATION BASIS NRO SHARES

Sr. No.	Name of Co	ISIN	Date of acquisition	No of shares	Face Value	Acquisition Price	Total Cost	Mode of Acquisition (IPO,Bonus/Split / Amalgamation/De merger/ Secondary Market)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								

Name:

Date:

Signature:  (Full signature required)

EQUITY SIP

Terms and Conditions

'Equity SIP' - a facility offered by Geojit, through its website www.geojit.com and through branches, whereby a CLIENT can plan a systematic investment on equity stocks of his/her/its choice selected from the SIP Stock list, in a Stock Exchange of his/her/its choice i.e. National Stock Exchange of India Ltd (NSE) or Bombay Stock Exchange Ltd (BSE), on a pre-specified date, for a pre-specified amount or a pre-specified quantity at regular intervals over a period of time as selected by the CLIENT, or through branches upon CLIENT's instruction.

The terms and conditions set forth herein are in addition to and in *pari passu* and not in prejudice to the terms and conditions set forth in the Rights & Obligations and Additional Rights & Obligations documents for broking and other products / services as prescribed by SEBI and the receipt of which was duly acknowledged vide the Declaration which the CLIENT has executed with Geojit.

1. 'Equity SIP Request' - Instruction placed by the CLIENT on Geojit's website / or through branch authorizing Geojit to place buy orders in the CLIENT's account as per the necessary details i.e. the scrip, stock exchange, amount / quantity to be invested, frequency of investment, total time period vide the Equity SIP request, time of placing order, etc. submitted by the CLIENT or through the branch.
2. 'SIP Type' The CLIENT shall select either 'Amount based Equity SIP' or 'Quantity based Equity SIP' at the time of placing the Equity sip request.

'Amount based Equity SIP' is a SIP type wherein presupposed amount (or approximately the same) is invested in the CLIENTS desired scrip. The amount specified/instructed by the CLIENT as the case may be should be equal to or above the minimum amount defined by Geojit.

'Quantity based Equity SIP' is a SIP type wherein presupposed quantity of shares of CLIENT's desired scrip is purchased. In case of Quantity based S.P., the quantity would be as specified by the CLIENT. The quantity / instructed by the CLIENT as the case may be should be equal to or above the minimum amount defined by Geojit.

3. By opting for this facility, the CLIENT hereby authorizes Geojit to process / execute the Equity SIP Requests placed / instructed by the CLIENT.
4. 'Equity SIP Order'- After the CLIENT have provided the necessary detail's i.e. the scrip, stock exchange, amount / quantity to be invested, frequency of investment, total time period vide the Equity SIP request, subject to the terms and conditions, Geojit Shall place CLIENT's Equity SIP buy order in accordance with the details specified by the CLIENT. The order placed by Geojit as per the CLIENT's authorization vide the Equity SIP Request are called 'Equity SIP order'.

At the time of placement of CLIENT's Equity SIP Order, since quantity of shares has to be specified, in the case of 'Amount based Equity SIP' the same will be calculated by dividing the SIP amount specified by the CLIENT with the prevailing market price of the scrip (including upfront brokerage) at the time of Equity Order placement as per the Equity SIP Request.

5. In order to have smooth and uninterrupted execution of Equity SIP Orders, Geojit will provide Electronic Clearance Service (ECS) facility to be Clients through a vendor arrangement. The CLIENT shall according to his/her/it will and desire avail such facility for convenience and Geojit shall under no circumstance be liable to Clients for any failure of deficiency caused with respect to availing thereof.
6. Frequency means the time interval, after the start date of the 'Equity SIP', with which the CLIENT wish SIP orders to be placed in the CLIENT's account depending on the frequency specified by the CLIENT, Geojit shall place Equity SIP Orders at the defined intervals after the start date for the total period specified by the CLIENT. The First order will be placed on the start date specified by the CLIENT and thereafter orders would be placed at the frequency for the total period as per CLIENT's Equity SIP Request.
7. The CLIENT agrees to maintain sufficient balance in his Trading Account to meet the payment obligations of Geojit arising due to the execution of Equity SIP. In case there is no sufficient balance in the trading account orders will be placed to the extent of buying power, which at times may result in partial execution of SIP orders.
8. The CLIENT can place 'Equity SIP Request' at any time during the day and even post market hours. The CLIENT when placing the Equity SIP request shall specify a "start date" from when Equity SIP order placement will



Signature of CLIENT

commence. Geojit shall place the Equity SIP Order from the start date specified by the CLIENT. The orders would be placed on the basis of the 'frequency' and the total period chosen by the CLIENT in the Equity SIP Request. The orders would be placed on the start date and frequency dates specified by the CLIENT provided they are trading days.

If the 'start date' and the 'Equity SIP Request' dates are the same, the Order would be placed on the next trading day, if the Request is not placed by the CLIENT during the Normal Trading Hours. In case the start date fall or frequency dates fall on Trading holidays, then the orders would be placed by Geojit on the subsequent trading day. During a SIP order placement date, the time of order placement will be within the normal prescribed trading hours, the time of placement of orders being at the discretion of Geojit but within the time slot specified in the Equity SIP request and the CLIENT shall not raise any claim or complaint on the said execution time. The details of Equity SIP Order would be displayed on the site for the CLIENT's reference.

9. CLIENT can place multiple Equity SIP Requests in a day for different scrips or for the same scrip irrespective of whether the SIP requests are Amount based or Quantity based. There is no restriction on the number of scrips that the CLIENT can choose for Equity SIP request provided the scrips are enabled under the SIP stock list. However, separate Equity SIP requests must be placed for each scrip. The CLIENT can choose both, Quantity as well as Amount based Equity SIP request simultaneously for different scrips or the same scrip. The CLIENT will have to place two different SIP requests for each SIP type in each Scrip.
10. Geojit is merely the CLIENT's agent for facilitating placing of orders as per the instructions given by the CLIENT under the facility. Geojit does not have any role to play in the execution of trades after the Equity SIP Orders have been placed. Trade execution takes place at the Stock Exchange platform as per the order matching rules of the exchange. Geojit is not responsible for non execution and partial execution of orders. If the scrip has hit the ceiling limits on the Equity Order placement date the Order shall be treated as sent to the Stock Exchange but not executed.
11. Geojit may give portfolio based recommendations under this product based on its analysis. CLIENT shall have to take due diligence and caution before investing in those portfolios. Any loss or damage caused due to reliance thereon for which, Geojit shall be under no circumstance be responsible or liable.
12. Geojit may from time to time instigate changes in the recommended portfolio which will be informed to the CLIENT over email. CLIENT shall also have to make respective changes in their portfolio.
13. Equity SIP orders would be market orders and would be executed at the price prevailing in the market at the time of order placement.
14. Brokerage rates and applicable charges for Equity SIP transactions would be the same as those applied to delivery transactions in the Cash Market Segment.
15. Settlement of Equity SIP transactions would be done in the same manner as in the case of transaction in Cash Market segment.
16. The CLIENT has the option to cancel the 'Equity SIP Request' with at any time before Geojit has initiated Equity SIP Order placement on the order placement date. Once the Equity SIP Request for a given scrip has been cancelled all future. Orders to be placed against the Equity SIP Request would stand cancelled. Cancellation can be done by either logging to the site or by instructing the branch concerned.
17. Equity SIP shall continue until cancelled or completed irrespective of any number of installments of Equity SIP Order failing for insufficient buying power.

Shares brought in the Equity SIP are at par with the ones bought by the CLIENT in Cash Market Segment. The CLIENT has the right to sell / deal with the shares brought through Equity SIP as per the CLIENT's requirement. If the shares brought through Equity SIP are sold on the same day of Equity SIP Order placement the trade shall be treated to be an intra-day trade.

I have read and understood the relevant Terms and Conditions for Equity SIP.



Signature of CLIENT

Name

Place.....

Date.....

Disclosures

1. In line with industry standards & practice and our business requirements, our employees are incentivized, financially or otherwise, for the business generated through various financial products & services offered. However, we do not have an incentive structure that encourages sale of products that are in conflict with your interests. Earnest efforts have been made to introduce the most comprehensive products & services, keeping our client's best interest in mind. This disclosure is being made voluntarily, towards our initiative to eliminate conflict of interest situations.
2. We do not offer any products with guaranteed returns.
3. Geojit disclose herewith that it currently does not undertake proprietary trading.

FOR HO USE ONLY

CLIENT DUE DILIGENCE CHECKLIST

1. Confirmed that the Client has been verified against the SEBI debarred list.
2. Confirmed that the Client has been verified against the UN Sanctions list.
3. The identity of the client does not match with those in the SEBI debarred list or the UN Sanctions list.
☐ Does not Match ☐ Does Match (tick whichever is applicable)
4. Action taken if the name is found matching

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In case of FPI Clients Only

- a) IOSCO database verified. Confirmed that client is a resident of a country whose Securities Market Regulator is an Appendix- A signatory to IOSCO's Multilateral Memorandum of Understanding (MMOU) (tick whichever is applicable) ☐ Yes ☐ No

OR

- b) Confirmed that the client is a resident of a country who is a signatory to bilateral Memorandum of Understanding with SEBI (tick whichever is applicable) ☐ Yes ☐ No
- c) Checked the High Risk and Non-cooperative jurisdictions of the FATF Public Statements and confirmed that the client is not resident in a country falling within the High Risk and Non-cooperative jurisdictions of the FATF Statement (tick whichever is applicable) ☐ Yes ☐ No

(Notes: (i) If either (a) & (b) above or (c) above indicates "No", the account shall not be opened)

Name of Verifying Employee :

Employee Code :

Date Verified :

Signature :

TRADING - CLIENT AUTHORIZATION TO THIRD PARTY

(Minor cannot be appointed)

Non-mandatory

To
 Geojit Financial Services Limited
 34/659-P, Civil Line Road, Padivattom, Kochi-682024

I/We _____ Indian Resident/NRI, aged _____ years, S/o /D/o _____ residing at _____

being a client of Geojit Financial Services Ltd. with Trade Code _____ do hereby nominate, appoint and authorize Mr./Mrs./Ms. _____ aged _____ years S/o / d/o _____ residing at _____

_____ hereinafter referred to as "Authorised Person" whose signature is appended below, to act for me, as my attorney, in my name and on my behalf to do, execute and perform or caused to be done all or any of the acts or things as envisaged in the Agreements executed by me with Geojit Financial Services Ltd. and such things, hereinafter specifically mentioned.

1. To do transactions on my behalf in shares, securities, derivative contract and all other Products and/or services offered by Geojit.
2. To present cheques to meet the payment obligations arising out of the transactions done on my behalf and in my account.
3. To receive cheques on my behalf with regard to this.
4. To subscribe / unsubscribe to the Products and/or services introduced or offered by Geojit from time to time.

I request Geojit to act on the instructions of the Authorised Person. I agree, and undertake that Geojit shall not be held responsible / liable for actions / inactions arising out of the said instructions.

I shall indemnify Geojit for any costs, losses, expenses, penalties and outgoings including legal fees and expenses incurred or suffered by Geojit due to such authorization.

I agree and understand that Geojit does not have any means such as biometric passwords, etc. to confirm / authenticate the authorized person acting under this Authorization.

I agree and confirm that the said authorization shall be cancelled or revoked only upon furnishing an advance written notice of 30 (thirty) days to Geojit which notice shall bear an acknowledgement of receipt by Geojit in writing specifically addressed to me.

I hereby ratify and confirm and agree to ratify and confirm all acts, deeds or the trades done or cause to be done by the Authorised Person under this authority and shall be construed as acts, deeds or trades done by me.

Name of the Authorized Person (Self Certified Proof of Identity of the Authorized person to be submitted alongwith the said Authorization)

(Signature of authorised person)

(Full signature required)

Address of the authorised person :
 Landline number of authorised person :
 Mobile number of authorised person :
 Email ID of authorised person :
 PAN of the authorised person :
 Date of birth of the authorised person : DD MM YYYY

Photo of the
 Authorized person
 Signature of the
 Authorized person across
 the photo

Any one of the following documents may be submitted as Proof of Identity:
 Passport Copy
 Driving License
 Pan Copy

Place:

Date:

Name:

 (full signature required)
 Signature of the Client

DECLARATION CUM UNDERTAKING FOR MOBILE NUMBER

To,
 Geojit Financial Services Ltd.
 34/659-P Civil Line Road, Padivattom
 Kochi - 682024.

Dear Sirs,

Sub : Mobile Number Declaration & Registration

Trading Account No: _____

DP ID and Client ID: _____

I do hereby confirm and declare that my mobile number(s) is/are follows:

Mobile No.									
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I authorize GFSL to provide me any Information / Alert / SMS / Call pertaining to my Trading & Demat account maintained with GFSL or pertaining to the Financial markets in general, even if this number is registered by me with NDNC List / NCPR / DND list of the service provider (s).

- I understand and agree that the above includes communication about orders & trades, margins, ledger balances, funds movement & balances, payment notice / bill outstanding, market session timings, service & utilities linked to my account, research advice and updates based on technical and fundamentals, including economic / market developments & announcements.
- I understand and agree that all the above shall be considered as Transaction Messages with regard to my account.

In case of my account being enabled in the commodities segment, then I understand that messages may continue till midnight given that the markets remain open till then.

I further undertake to keep you informed about the changes in the mobile number, and non-receipt of such updation from my end may be construed that the above given mobile number is valid and subsisting.

I also understand and agree that in the event of me not continuing an account with GFSL or keep my account dormant or ever request to temporarily suspend the account, the Research advice and updates may continue, unless I give in writing to GFSL to that extent to stop such communications.

Yours truly,

 (full signature required)
 Signature

Date:

Disclaimer: The research calls are based on technical and fundamental analysis and does not in any manner assure or guarantee any profits out of the trades based on the same. GFSL herein insist upon the client to kindly read through the RDD carefully before dealing in securities and commodities market.

ACKNOWLEDGEMENT

Geojit Financial Services Limited

34/659-P, Civil Line Road, Padivattom, Kochi-682024

Dear Sir,

I hereby acknowledge receipt of the standard KYC documents (Mandatory and Non-mandatory) set from you:-

1. Rights and Obligations of Stock Broker, Sub-brokers and Clients
2. Rights and Obligations of Member, Authorised Person and Clients
3. Risk Disclosure Document (RDD) of securities and commodity market
4. Rights & Obligation of Depository Participants & Beneficial Owner
5. Rights and Obligations of Stock Broker & Clients For Margin Trading Facility (MTF)
6. Guidance note on securities market- Do's and Don'ts for investors
7. Guidance note on commodity market- Do's and Don'ts for investors
8. Geojit Policies and Procedures
9. Additional Rights and Obligations of Stock-broker/Member/Sub-broker/Authorised Person and Client.
10. Authorisation to debit funds from client designated bank account to meeting fund or systematic SIPs.

I state that I have read and understood all above documents and these documents are binding upon me.

I also acknowledge receipt of following document.

1. Customer awareness document on PMLA

Thanking you,

Signature of the Client :  (Full signature required)

Date:

Note: The above mentioned standard set of KYC documents, which are part of the Stock broking, commodity and depository account opening kit is made available in our website www.geojit.com in 15 regional languages for your ease reference.

Disclosures

1. In line with industry standards & practice and our business requirements, our employees are incentivized, financially or otherwise, for the business generated through various financial products & services offered. However, we do not have an incentive structure that encourages sale of products that are in conflict with your interests. Earnest efforts have been made to introduce the most comprehensive products & services, keeping our client's best interest in mind. This disclosure is being made voluntarily, towards our initiative to eliminate conflict of interest situations.
2. We do not offer any products with guaranteed returns.
3. Geojit disclose herewith that it currently does not undertake proprietary trading.


CASH RECEIPTS & PAYMENTS STRICTLY NOT ALLOWED

Clients are requested to make payments to "Geojit Financial Services Ltd." by Cheques/Account transfers. In case of Demand Drafts / Pay-Orders, client to substantiate that the same is drawn favouring Geojit Financial Services Ltd. with his/her/their permission and knowledge. The Demand Drafts/Payorders must be accompanied by DD Slip or Bank Letter or Bank Statement etc. clearly showing that DD is issued from Client's Bank account only.

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NACH Important Instructions:

1. This mandate is an authorization to debit funds from your designated Bank account. Please ensure that it is signed by the respective account holder(s) of the Bank.
2. Signature(s) on the mandate should be as it appears in the Bank records of the Client(s). All holders as appearing in the Bank records would be required to sign the mandate.
3. Though it is signed, it's not necessary that mandate gets registered at Banks end as it all depends on the respective Bank's inclusion in NACH list. Also the Bank may reject the mandate based on their validations.
4. This mandate can be linked only to the Bank account Registered in your Trading account with us.
5. This mandate can take a maximum time of 20 days to register at Bank's end, so any requirement of funds during this period should be taken care of.
6. At any time you have the option to cancel this mandate.
7. The amount mentioned here is the maximum limit Geojit can request to draw from your Bank account. Please ensure that the funds remain in the Bank account at the time of collection.
8. This is for the use of Equity and Mutual Fund SIPs, Margin payments ,collecting of MTM debit for derivative trades and for collecting charges on depository services.
9. Write the maximum amount to be used for all your SIPs.

Debit mandate form NACH / ECS / DIRECT DEBIT									
		UMRN						Date	
		Sponsor Bank Code				Utility Code			
Tick (✓) <input checked="" type="checkbox"/> CREATE <input type="checkbox"/> MODIFY <input type="checkbox"/> CANCEL		I/We hereby authorize Geojit Financial Services Ltd				to debit (tickV)		<input type="checkbox"/> SB /CA /CC /SB-NRE /SB-NRO /Other	
		Bank a/c number							
with Bank						IFSC		or MICR	
an amount of Rupees								₹	
FREQUENCY		<input checked="" type="checkbox"/> Mthly <input checked="" type="checkbox"/> Qtly <input checked="" type="checkbox"/> H-Yrly <input checked="" type="checkbox"/> Yrly <input checked="" type="checkbox"/> As & when presented				DEBIT TYPE		<input checked="" type="checkbox"/> Fixed Amount <input checked="" type="checkbox"/> Maximum Amount	
Reference 1						Phone No.			
Reference 2						Email ID			
I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of the bank.									
PERIOD		From <table border="1" style="display: inline-table; width: 100px; height: 20px;"></table> To <table border="1" style="display: inline-table; width: 100px; height: 20px;"></table> Or <input type="checkbox"/> Until Cancelled							
						1. _____ 2. _____ 3. _____			

* This is to confirm that the declaration has been carefully read, understood & made by me/ us. I am authorizing the User entity / corporate to debit my account.

* I have understood that I am authorized to cancel / amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / corporate or the bank where I have authorized the debit.

VERSION - 24



For more details, please contact:
Toll Free: 1800 425 5501 / 1800 103 5501
Paid Line: +91 484 411 4306

www.geojit.com