

ACCOUNT MODIFICATION FORM

INDIVIDUAL & NON-INDIVIDUAL - BROKING & BO ACCOUNT DETAILS

(Please fill all the details in CAPITAL LETTERS only)

This request is applicable only to Trading Account no. &/or BO account no. stated below

Application No. Date

Modification Request For Only Broking Account Only Demat Account Both Broking & Demat

Account Holder's Details

Broking Account Code BO ID

First Holder's Name

Second Holder's Name

Third Holder's Name

I/We request you to make following modifications to my / our above mentioned accounts maintained with you

Particulars For*	Details*	Existing Details	New Details
<input type="checkbox"/> Modification <input type="checkbox"/> Addition <input type="checkbox"/> Deletion	<input type="checkbox"/> Bank Account Details	Bank Name: Branch: A/c Type: A/c Number: MICR Code: IFSC Code	Bank Name: Branch: A/c Type: A/c Number: MICR Code: IFSC Code
	<input type="checkbox"/> Demat Account Details	DP Name: DP ID: Client ID:	DP Name: DP ID: Client ID: Default Account: Yes / No
	<input type="checkbox"/> Gross Annual Income Details <i>(please tick appropriate box)</i>	<input type="checkbox"/> Not provided <input type="checkbox"/> ₹10-25 lacs <input type="checkbox"/> Below ₹1 Lac <input type="checkbox"/> ₹25 lacs- ₹1 crore <input type="checkbox"/> ₹1-5 lacs <input type="checkbox"/> Above ₹1 crore <input type="checkbox"/> ₹5-10 lacs	<input type="checkbox"/> Below ₹1 Lac <input type="checkbox"/> ₹10-25 lacs <input type="checkbox"/> ₹1-5 lacs <input type="checkbox"/> ₹25 lacs- ₹1 crore <input type="checkbox"/> ₹5-10 lacs <input type="checkbox"/> Above ₹1 crore
	<input type="checkbox"/> Net Worth <i>(Not older than 1 year)</i>	₹ _____ as on date _____	₹ _____ as on date _____
	<input type="checkbox"/> Status <i>(Only for demat account)</i>	<input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI-Repatriable <input type="checkbox"/> NRI-Non Repatriable	<input type="checkbox"/> Resident Individual <input type="checkbox"/> NRI-Non Repatriable

*Please tick whichever applicable | *For list of documents please refer page 2

Name & Signatures

FOR PL OFFICE USE ONLY

Broking

DP

AMC Received on

Signature Verified By

Details Modified by/on

LIST OF DOCUMENTS TO BE SUBMITTED ALONGWITH MODIFICATION FORM

Sr. No.	Modification In	Documents To Be Submitted
1.	Bank Details	<ul style="list-style-type: none"> • Provide details of MICR code & IFSC code • Copy of any one of the following documents: <ol style="list-style-type: none"> 1. Bank Statement / Passbook alongwith cancelled cheque & pages 2. Cancelled cheque bearing name of the first-holder 3. bearing Account number, Name/address of accountholder and 4. details of last 3 months transaction in account Letter from Bank Manager confirming Name & Account number 5. alongwith cancelled cheque
2.	Demat Account Details	<ul style="list-style-type: none"> • Inform if new demat account is to be marked default demat in Trading A/c • Copy of any one of the following documents: <ol style="list-style-type: none"> 1. Copy of DP Client master, duly attested by DP officials 2. Latest Transaction/Holding statement bearing BOID 3. Name & Status of the account holder
3.	Demat Account Status - Resident Individual Account to NRI Non Repatriable Account	<ul style="list-style-type: none"> • Proof of NRI Status i.e. Passport which indicates change of residential status alongwith Resident Visa/Work Permit/ Employment Visa/ Current Visa • KRA-KYC Change Form indicating his new status, Foreign address & Contact details • All proof documents as applicable for NRI account
4.	Demat Account Status - NRI Repatriable Account to Resident Individual Account	<ul style="list-style-type: none"> • KRA-KYC Change Form indicating his new status, Indian address & Contact details • Proof of Resident Bank Account • Declaration Form on change in Repatriability Status of securities
5.	Demat Account Status - NRI Repatriable Account to NRI Non Repatriable Account	<ul style="list-style-type: none"> • Proof of NRO & NRO-PIS Bank Account • Declaration Form on change in Repatriability Status of securities
6.	Demat Account Status - NRI Non Repatriable Account to Resident Individual Account	<ul style="list-style-type: none"> • KRA-KYC Change Form indicating his new status, Indian address & Contact details • Proof of Resident Bank Account