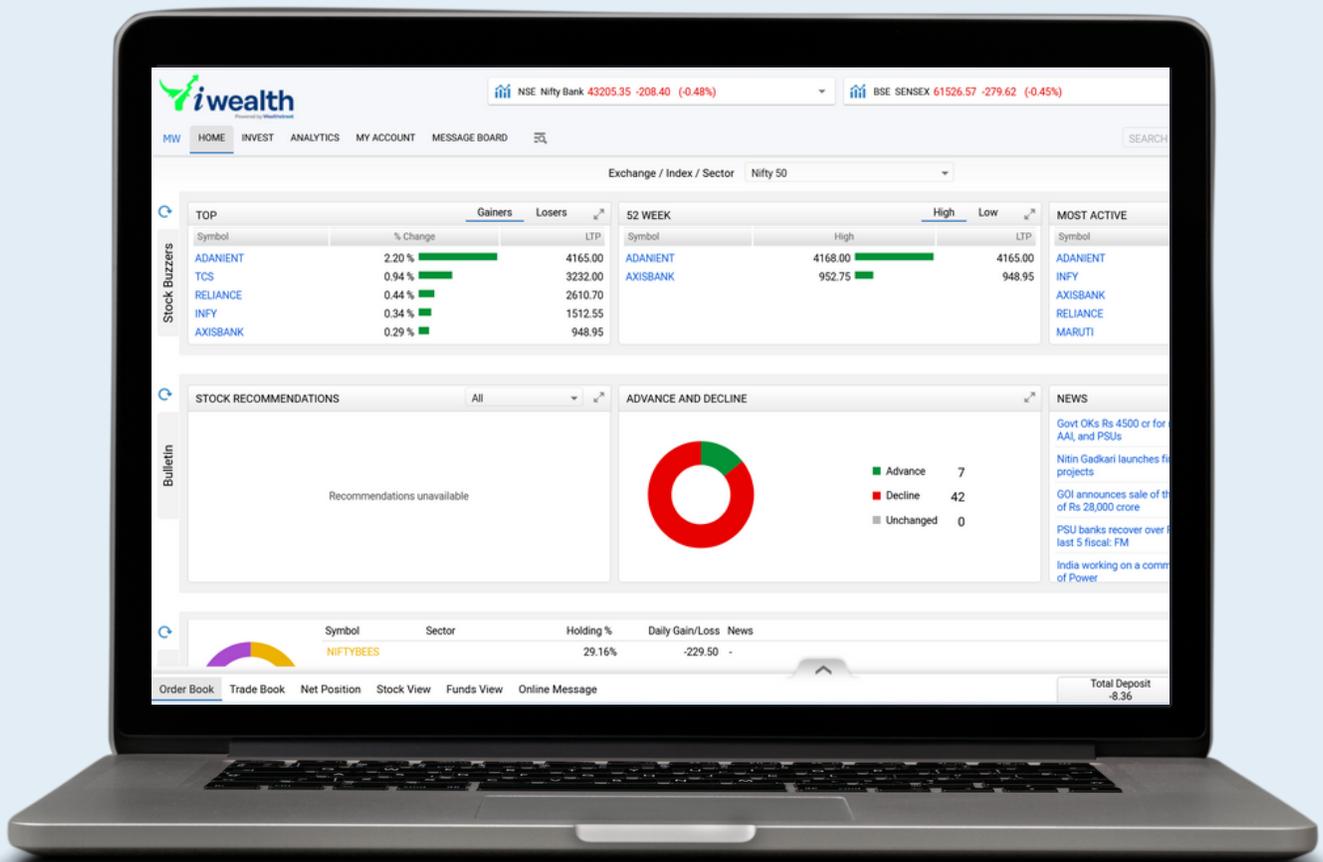


# iwealth

## Online Demat Account Opening

### Step-by-step KYC Process



**Wealthstreet is one-stop solution for all your financial requirements.**

- ◆ Stock Broking
- ◆ Mutual Fund
- ◆ Insurance Advisory

# Sign Up and Complete KYC to Get Started!

KYC is a prerequisite for opening a DMAT account.

Visit our website and click on sign up button from the home page

<https://www.wealthstreet.in/>

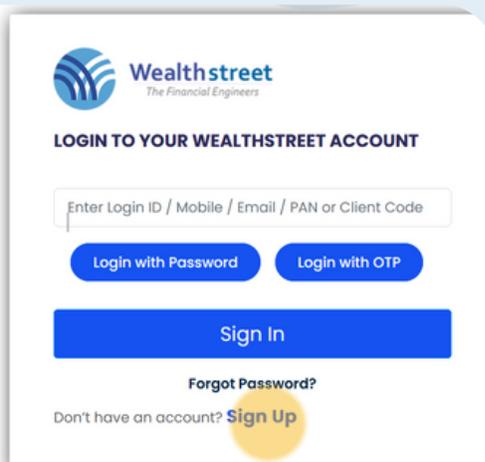


Managing your investments has never been so easy.



- ◆ Simple
- ◆ Fast
- ◆ Secure

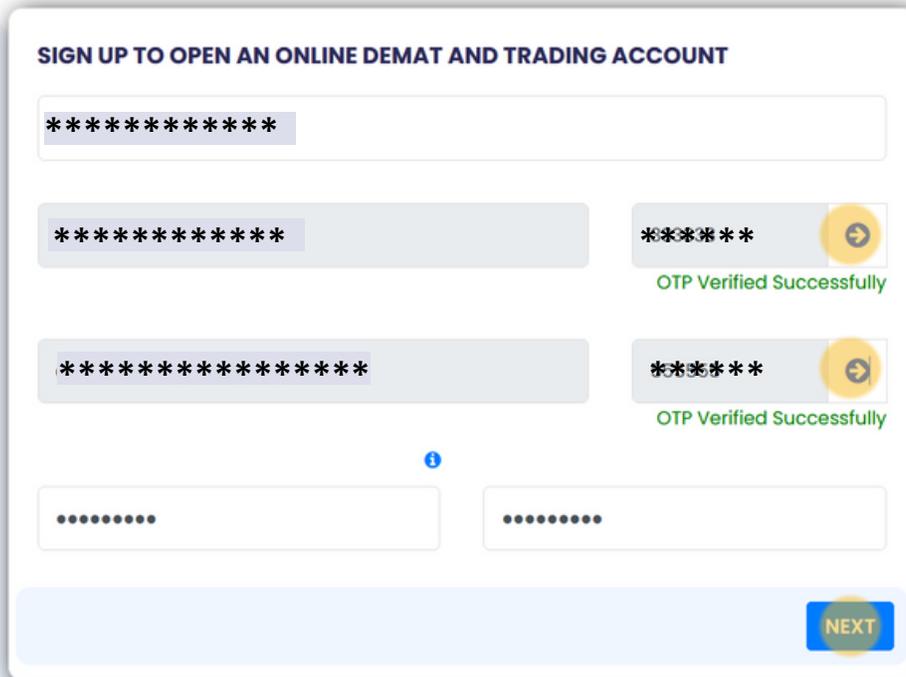
Control of your investments with Wealthstreet Desk - Anytime, Anyplace.



## Sign up to open an online Demat and Trading account

### ➤➤➤ Let's begin with a quick SIGN UP for KYC

- Enter first name
- Enter mobile number and click on arrow to get an OTP
- Enter email address and click on arrow to get an OTP
- After OTP Verification, enter and confirm password
- Click NEXT

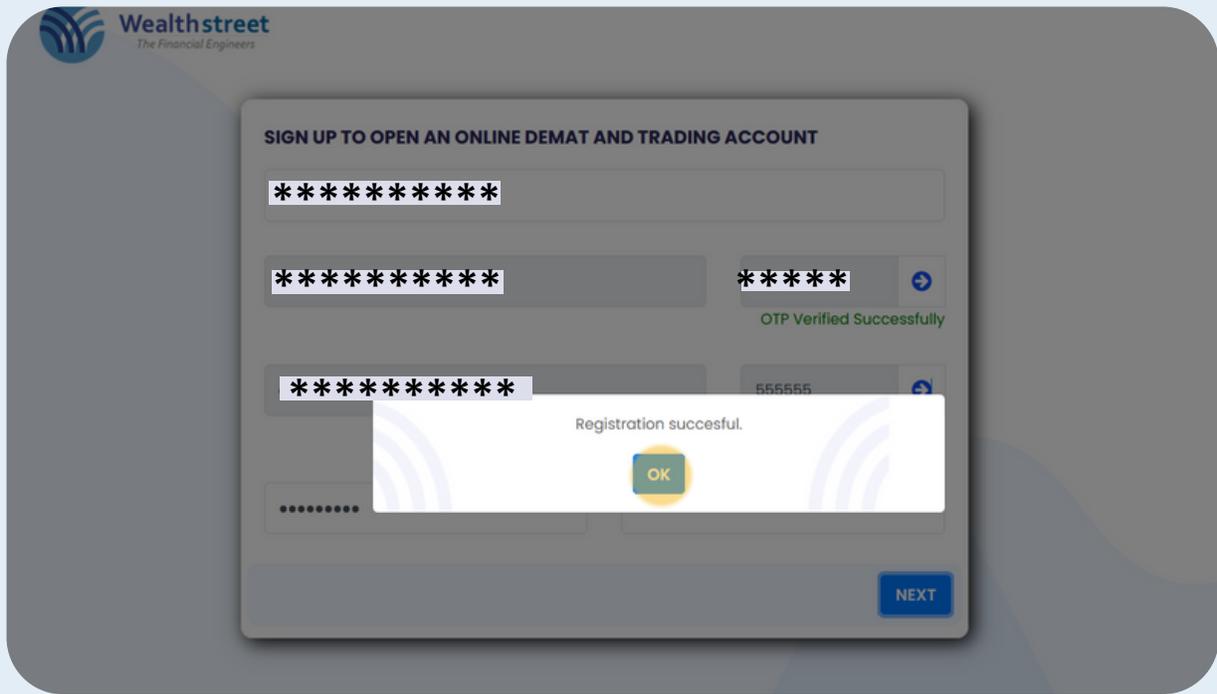


Individuals must be at least 18+yrs to open an account.

#### Password Policy:

- A password must be atleast 8 characters long(max 15 characters)
- A password must contain atleast one uppercase, lowercase, number and special character

## Registration successful



- With a registered account, you can initiate up to 5 KYC signups
- Once account is created, you will have option to resume editing KYC edit option

WA Wealthstreet Admin Add New KYC Entry

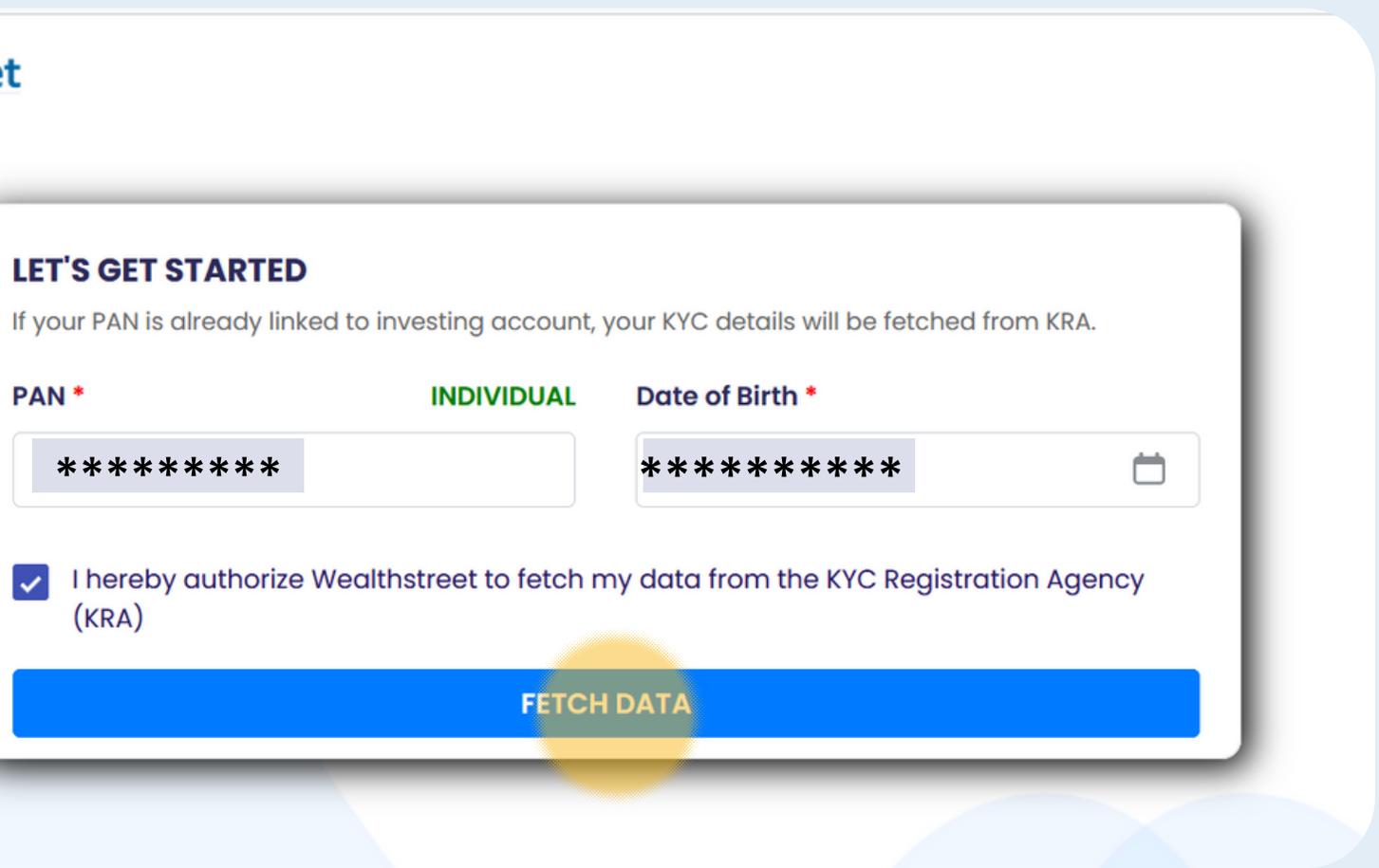
Wealthstreet The Financial Engineers										
		Client	Account		Holder	Type	Last Change	Autho Id	Status	Remark
Show 10 entries						Equity Trading	12 Apr 2023 12:11PM			
<input checked="" type="checkbox"/>	<input type="checkbox"/>				Online	Equity Trading	12 Apr 2023 12:53PM	Wealthstreet Admin	IPV Pending	test
<input checked="" type="checkbox"/>	<input type="checkbox"/>				Online	Equity Trading	12 Apr 2023 12:53PM			
<input checked="" type="checkbox"/>	<input type="checkbox"/>				Online	Equity Trading	12 Apr 2023 1:16PM			

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

## >>> Let's get started with KYC

- Enter your PAN (only for individuals, in case of non-individuals, contact us at [kyc@wealthstreet.in](mailto:kyc@wealthstreet.in))
- Enter your Date of Birth (Online Sign up is only for 18+ yrs, in case of minor contact us at [kyc@wealthstreet.in](mailto:kyc@wealthstreet.in))
- Confirm to authorize Wealthstreet to fetch my data from the KYC Registration Agency (KRA)
- Click on FETCH DATA



**LET'S GET STARTED**

If your PAN is already linked to investing account, your KYC details will be fetched from KRA.

**PAN \*** **INDIVIDUAL** **Date of Birth \***

\*\*\*\*\*

\*\*\*\*\*

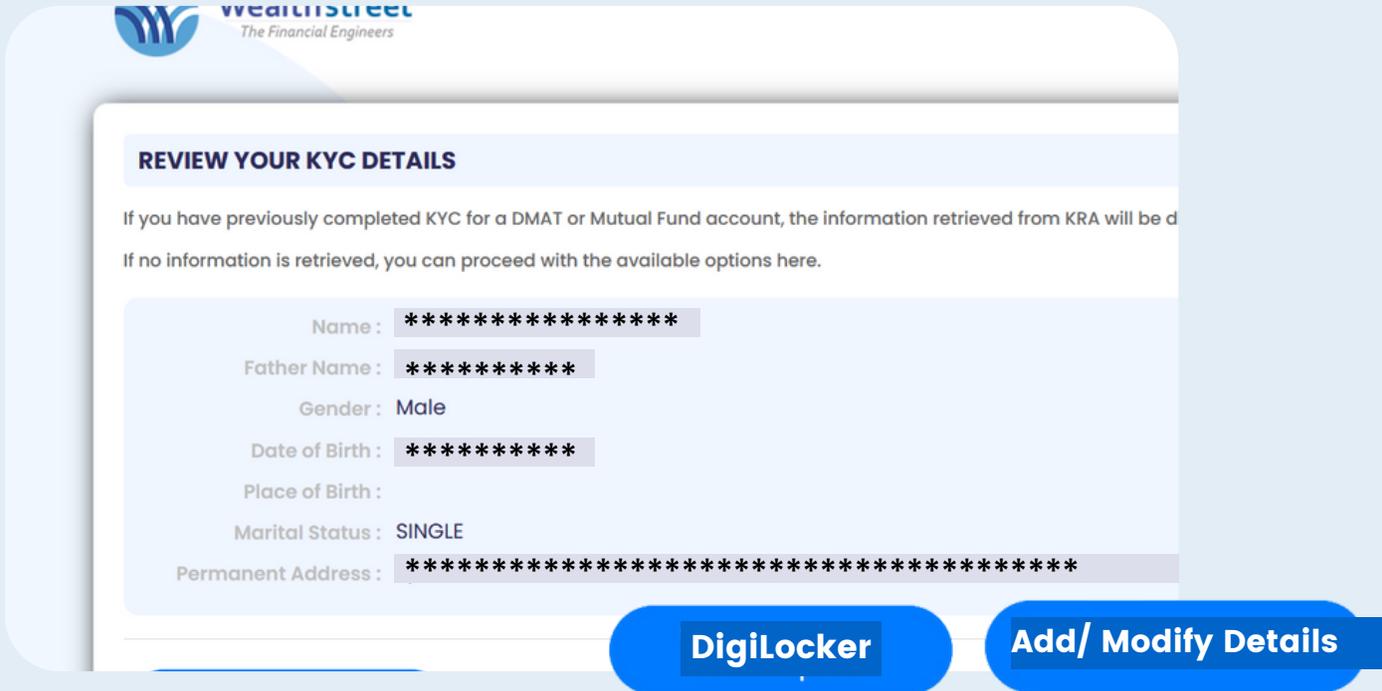
I hereby authorize Wealthstreet to fetch my data from the KYC Registration Agency (KRA)

**FETCH DATA**

If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from KRA will be displayed for your review in the next page.

## ➤➤➤ Review your KYC details

- Name field is non editable
- Remaining fields information can be updated only via add/modify option



**REVIEW YOUR KYC DETAILS**

If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from KRA will be displayed here. If no information is retrieved, you can proceed with the available options here.

Name : \*\*\*\*\*

Father Name : \*\*\*\*\*

Gender : Male

Date of Birth : \*\*\*\*\*

Place of Birth :

Marital Status : SINGLE

Permanent Address : \*\*\*\*\*

**DigiLocker**      **Add/ Modify Details**

## Address Proof & Information Update Options

- Case 1 :** All details are correct and You'd like to update the current address same as your **Aadhar Address** then continue with **DigiLocker**.
- Case 2 :** All details are correct and You'd like to update a **different address proof** then continue with **Add/ Modify Option**.
- Case 3 :** **For any edits** in the displayed data continue with **Add/Modify Option** irrespective of the address proof choice. You can update any address proof including Aadhaar

## ➤➤➤ Review your KYC details

**Case 4 :** If no information is retrieved, you proceed with the **Add/ Modify Option.**

### REVIEW YOUR KYC DETAILS

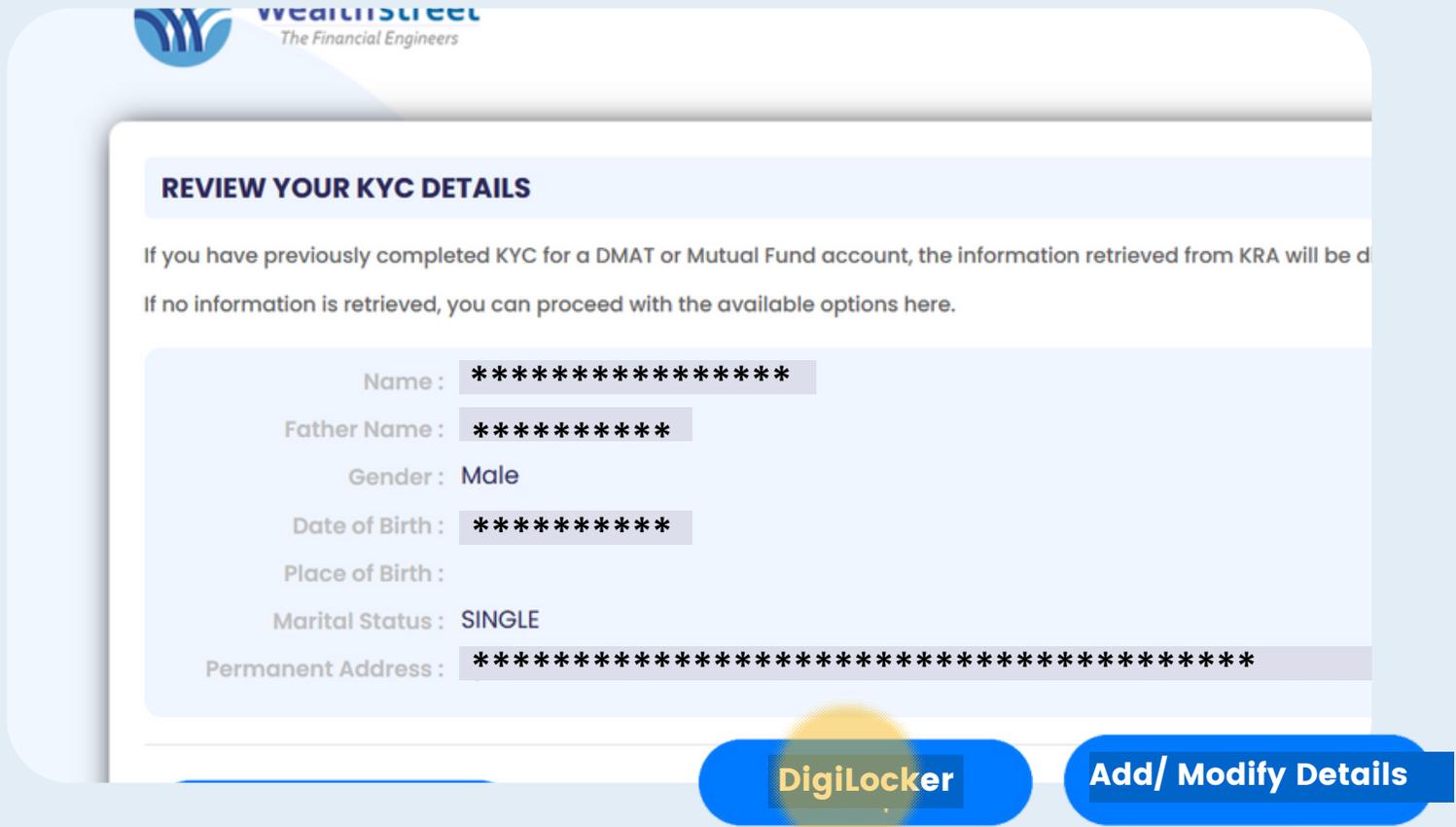
If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from the account will be displayed here.  
If no information is retrieved, you can proceed with the available options here.

Name :	{{FullName}}
Father Name :	{{FatherName}}
Gender :	{{Gender}}
Date of Birth :	{{DOB}}
Place of Birth :	{{BirthPlace}}
Marital Status :	{{MaritalStatus}}
Permanent Address :	{{PAdress}}

[DigiLocker](#) [Add/ Modify Details](#)

## ➤➤➤ Review your KYC details – DigiLocker

**Case 1** where all details are correct and You'd like to update the current address same as your Aadhar Address then continue with **Digilocker**.



**REVIEW YOUR KYC DETAILS**

If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from KRA will be displayed here. If no information is retrieved, you can proceed with the available options here.

Name : \*\*\*\*\*

Father Name : \*\*\*\*\*

Gender : Male

Date of Birth : \*\*\*\*\*

Place of Birth :

Marital Status : SINGLE

Permanent Address : \*\*\*\*\*

**DigiLocker**      **Add/ Modify Details**

- Aadhaar KYC will automatically update the address and upload a scanned copy of your Aadhaar card as proof of address and the scanned copy of your PAN if available in your DigiLocker account.
- Thus, manual upload of PAN and Aadhaar document is not required in the document section.

### What is Aadhaar KYC?

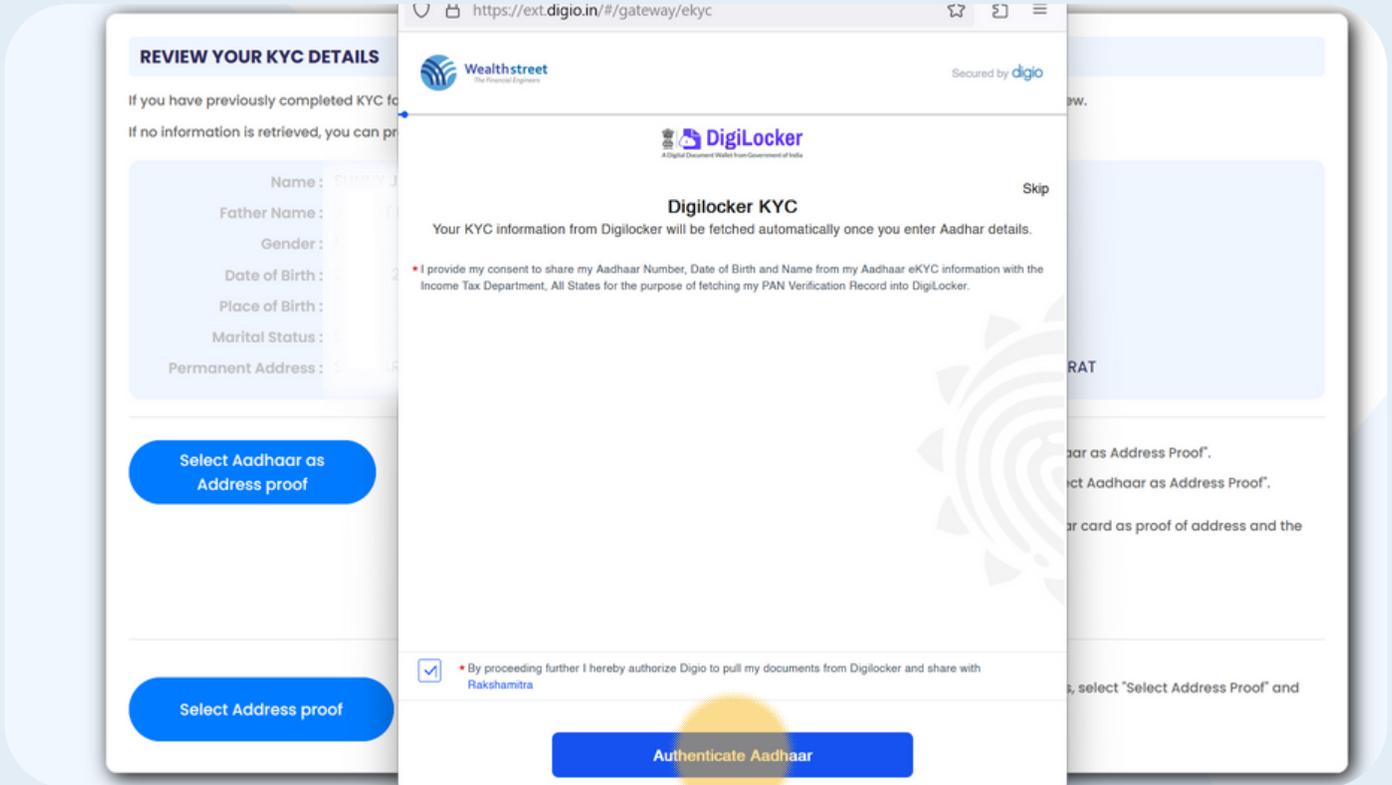
Aadhaar KYC will allow access of address information for KYC from DigiLocker account. Your Aadhaar card must have your mobile number linked for online KYC. If your mobile number is not linked, please reach out to us to complete an offline form.

### What is DigiLocker?

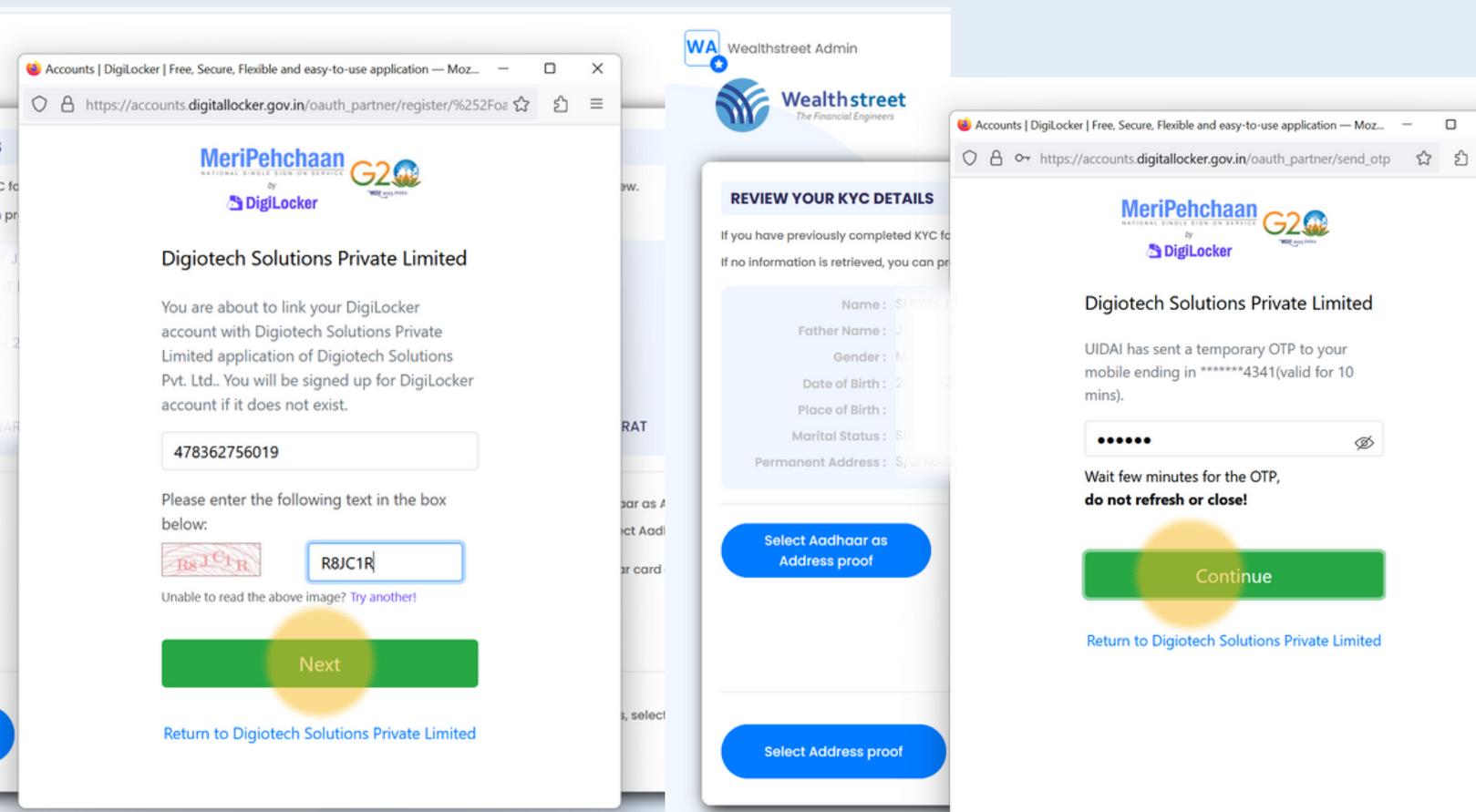
Digital locker is a government platform to store and access their important documents, including Aadhaar card, PAN card, driving license, etc. for individuals. The platform also integrates with various agencies to provide an easy and secure way to access records online.

## ➤➤➤ DigiLocker KYC

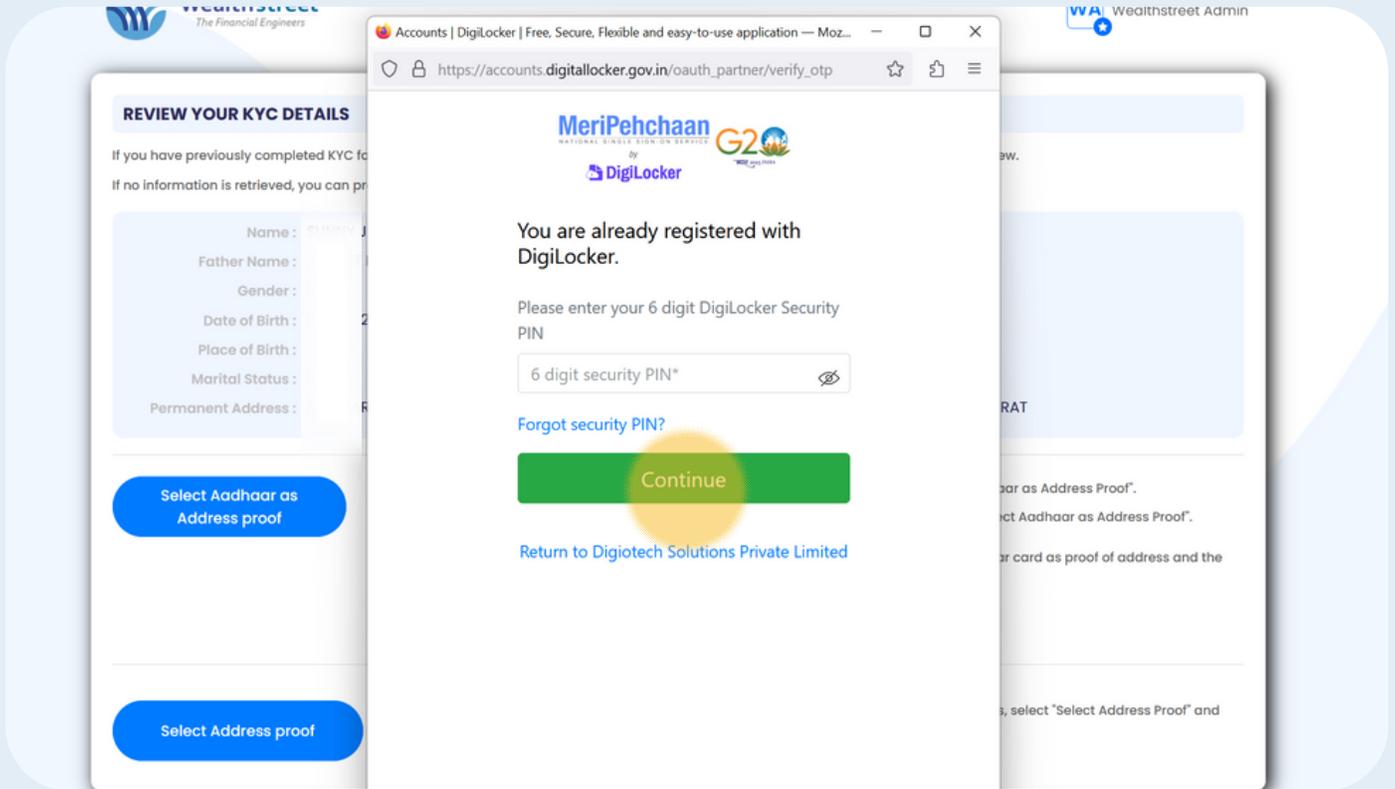
- Proceed to authenticate Aadhaar to fetch KYC data



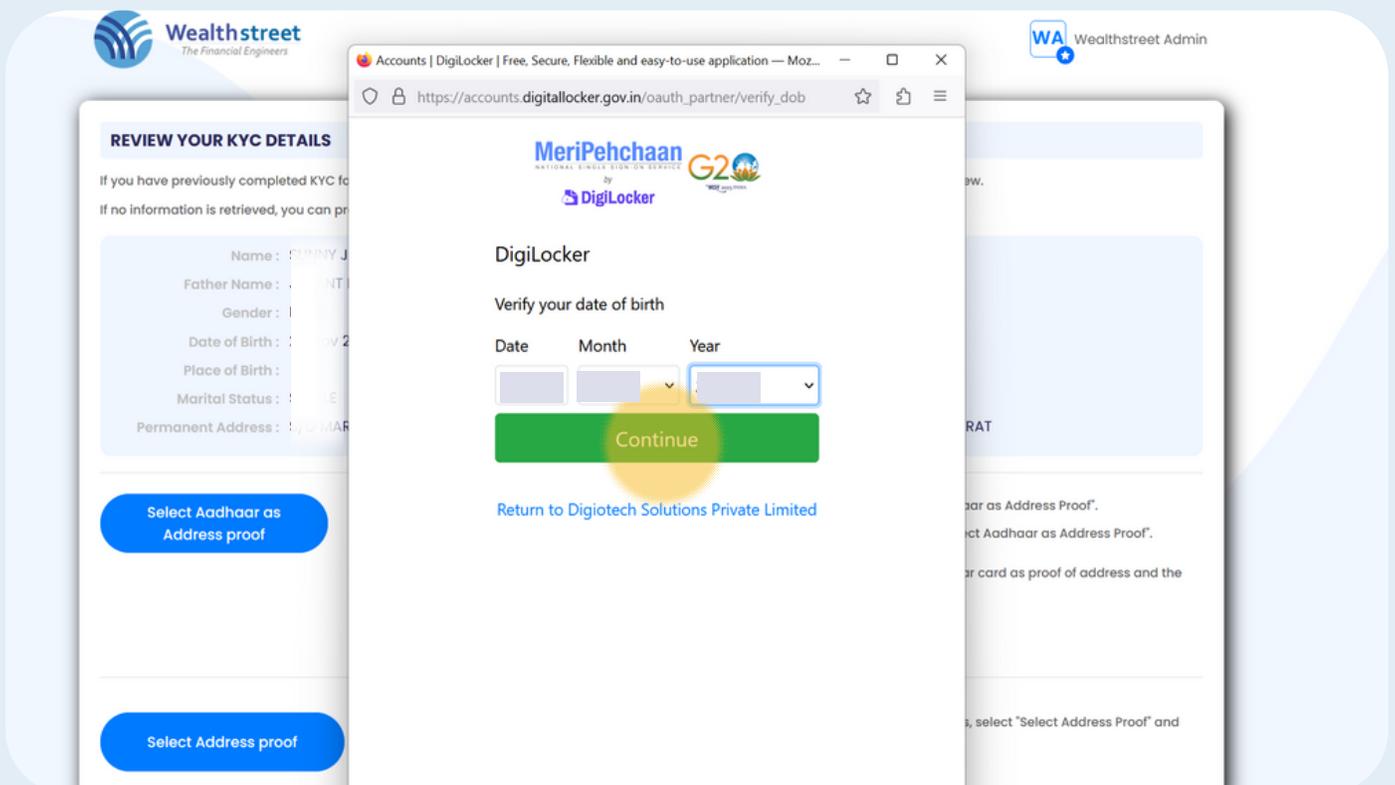
- Enter Aadhaar number, captcha code and OTP



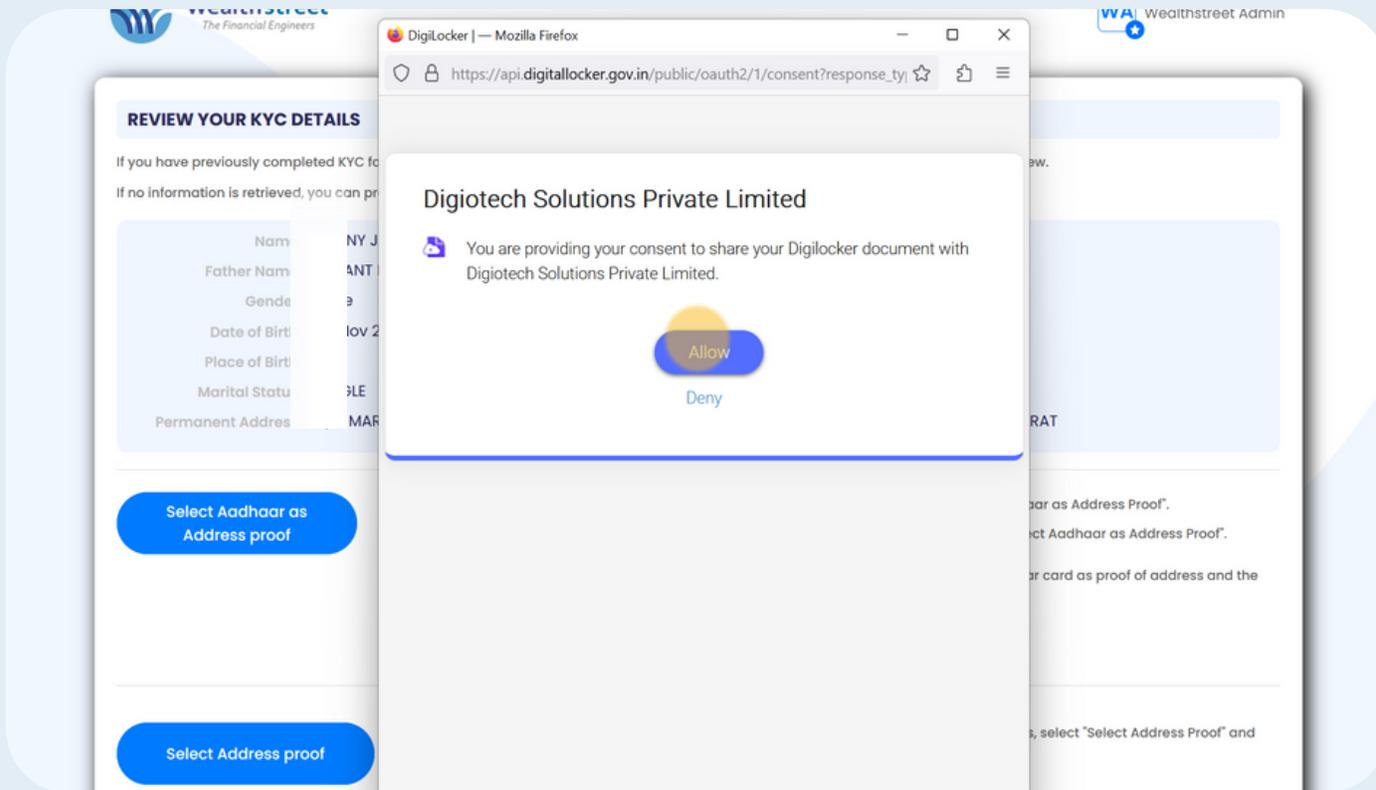
- Enter your 6-digit DigiLocker pin.



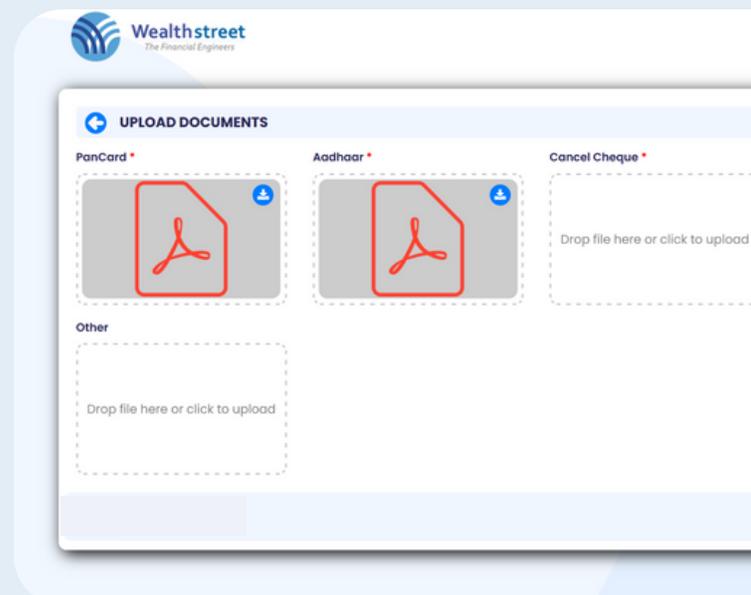
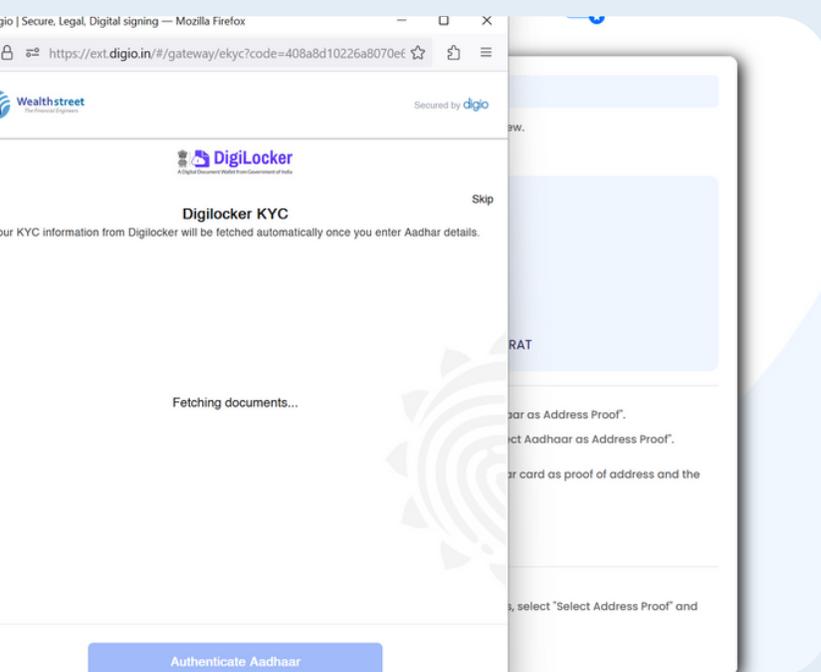
- If you forgot password you can reset pin. For authentication you are required to add date of birth details.



- Click on Allow to provide your consent to fetch documents from DigiLocker



- Aadhaar & PAN documents are fetched and uploaded in the document section.



## ➤➤➤ Add personal details

- For self registration select online, for referred by our partner and relationship manager choose name

### Keep the following documents ready!

- **Proof of Bank**

Cancel cheque (with Name Printed on cheque), if Client name not printed on cheque than Bank Passbook/Statement having latest bank entry Req along with Bank stamp or Logo.

- **Signature**

Signature

- keep the required documents handy.

**NEXT**

## ➤➤➤ Add Nominee details

- Nominee is compulsory for Equity Segment

## ➤➤➤ Add Bank details

- Add and verify bank details.
- IFSC, MICR code should match with the bank proof.

# ➤➤➤ Select Brokerage & DP Plan & confirm the disclaimer

## ← BROKERAGE & DP TARIFF DETAILS

### CHOOSE PLAN FOR DEMAT SERVICES

<input type="radio"/> Regular Annual Charges RS.400/- (1st Year Free) <a href="#">View More</a>	<input type="radio"/> One Time AMC Annual Charges RS.1500/- <a href="#">View More</a>	<input checked="" type="radio"/> Life Time Free AMC Annual Charges FREE <a href="#">View More</a>
---	---	---

### BROKERAGE CHARGES

	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)
Equity Cash	0.03	2.00	0.30	2.00	NA

NOTE :

## ← BROKERAGE & DP TARIFF DETAILS

	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)
Equity Cash	0.03	2.00	0.30	2.00	NA

### NOTE :

- We reserve the rights to change/add charges with 30 days prior notice.
- Charges/Tariffs shall be revised/ changed at WSAPL's discretion, intimation of which shall be done by E-mail/Post
- For Account opening charges/annual maintenance, cheques required Payable at Par/DD.
- All Payments should be in favour of "wealthstreet Advisors Private Limited".
- The above rates are exclusive of Stamp Duty, Exchange Transaction charges, Securities Transaction Tax, SEBI Turnover Charges and GST which will be charged extra at the rate prevailing from time to time. Further it is exclusive of any other charges/Levies that may be imposed from time to time.
- For Internet Based Trading (IBT) clients, additional charges with regard to software access etc. will be applicable as per the terms agreed at relevant point in time.

\*\*\* Subject to initial margin of minimum Rs. 2 lacs.

I/we accept above Charges Structure.

NEXT

## ← DISCLAIMER

- I confirm having read/been explained and understood the contents of the document on policy and procedure of the stock broker and the tariff sheet, and all voluntary / non-mandatory documents.
- I further confirm having read and understood the contents of the 'Rights and Obligations' document(s), 'Risk Disclosure Document' and 'Guidance Note' with 'Policy and Procedures' Do's and Dont's for stock and commodities segment. I do hereby agree to be bound by such provisions as outlined in these documents. I have also been informed that the standard set of documents has been displayed for information on stock broker's designated website www.wealthstreet.in.
- The rules and regulations and Bye laws 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 we agree to abide by and to be bound by the rules, regulations and bye laws 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 non-resident account, I/We also declare that I/We have complied and will continue to comply with FEMA regulations. I/We acknowledge the receipt of copy of the document, "Rights and Obligations of the Beneficial Owner and Depository Participant".

I confirm above Declaration

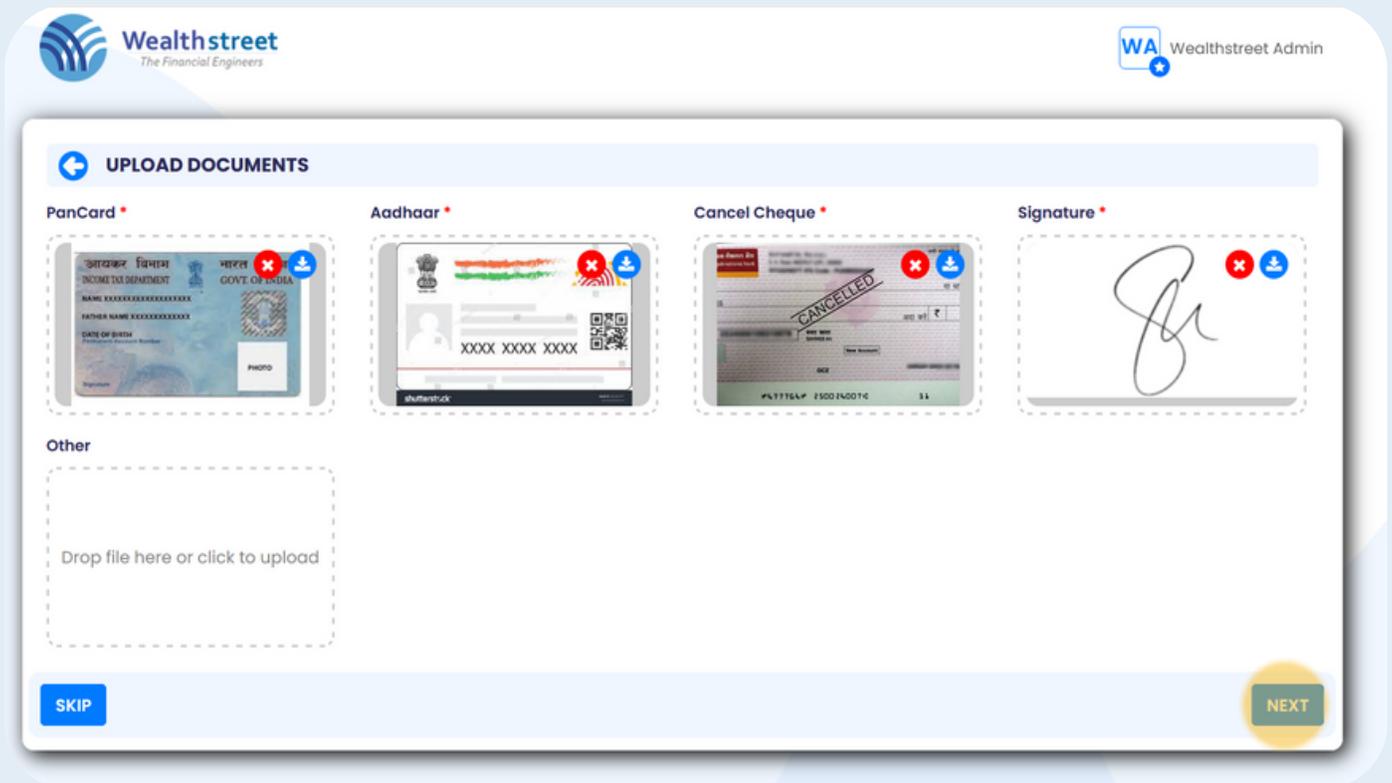
I accept default Preference for Standing Instructions / other details / Email-SMS alert / Contract note.

I confirm and understand that my name as per the IT Department will be taken as my default Wealthstreet account name, in case there is a mismatch of my name as per the IT department and my name as per the KRA database/Aadhaar/Bank account. I further confirm that the linked bank accounts, Aadhaar, and PAN belong to me.

NEXT

## »» Upload Documents

- PAN & Aadhaar documents are auto fetched via DigiLocker
- Upload Cancelled Cheque and Signature. Signature must be on a blank page.



The screenshot displays the 'Upload Documents' section of the Wealthstreet Admin interface. At the top left is the Wealthstreet logo, and at the top right is the 'WA Wealthstreet Admin' user indicator. The main area is titled 'UPLOAD DOCUMENTS' and contains four document upload slots, each with a red 'X' and a blue download icon:

- PanCard**: Shows a preview of a PAN card with fields for Name, Father Name, and Date of Birth.
- Aadhaar**: Shows a preview of an Aadhaar card with a QR code and masked numbers (XXXX XXXX XXXX).
- Cancel Cheque**: Shows a preview of a cancelled cheque with a 'CANCELLED' stamp.
- Signature**: Shows a preview of a handwritten signature on a blank page.

Below these slots is an 'Other' section with a dashed box and the text 'Drop file here or click to upload'. At the bottom of the interface, there are two buttons: a blue 'SKIP' button on the left and a yellow 'NEXT' button on the right.

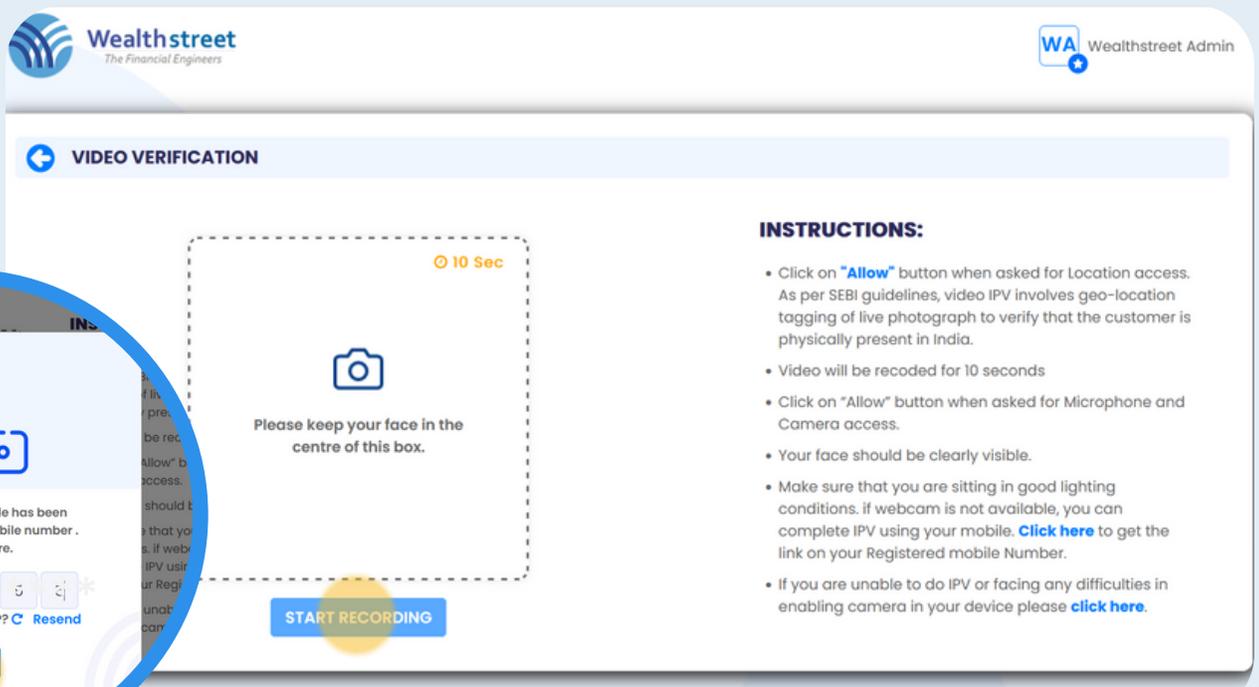
- Only RM & Partners can skip the document upload

## >>> Video Verification

### Instructions:

- Click on "Allow" button when asked for Location access. As per SEBI guidelines, video IPV involves geo-location tagging of live photograph to verify that the customer is physically present in India.
- Video will be recorded for 10 seconds
- Click on "Allow" button when asked for Microphone and Camera access.
- Your face should be clearly visible.
- Make sure that you are sitting in good lighting conditions. if webcam is not available, you can complete IPV using your mobile. Click here to get the link on your Registered mobile Number.
- If you are unable to do IPV or facing any difficulties in enabling camera in your device please click here.
- Retake the picture if the eyes are closed and save.

Proceed with Video Verification and enter OTP



**WEALTHSTREET**  
The Financial Engineers

**WA** Wealthstreet Admin

### VIDEO VERIFICATION

10 Sec

Please keep your face in the centre of this box.

**START RECORDING**

**INSTRUCTIONS:**

- Click on "Allow" button when asked for Location access. As per SEBI guidelines, video IPV involves geo-location tagging of live photograph to verify that the customer is physically present in India.
- Video will be recorded for 10 seconds
- Click on "Allow" button when asked for Microphone and Camera access.
- Your face should be clearly visible.
- Make sure that you are sitting in good lighting conditions. if webcam is not available, you can complete IPV using your mobile. [Click here](#) to get the link on your Registered mobile Number.
- If you are unable to do IPV or facing any difficulties in enabling camera in your device please [click here](#).

A 6-digit verification code has been sent to your registered mobile number. Please enter here.

5 5 5 5 5 5

Didn't receive OTP? [Resend](#)

**CONFIRM**

## DDPI

### Proceed with DDPI/POA activation

←
**DDPI**

You can use DDPI to authorize Wealthstreet to access your demat account only to meet pay-in obligations for settlement of trades executed by you.

The use of DDPI will be limited only for two purposes:

- To transfer securities held in your account towards stock exchange related deliveries or settlement obligations
- To pledge/re-pledge securities

**Post DDPI, please follow the below guidelines for authorization of other transactions:**

Type of Transaction	Post DDPI, Authorized via
Corporate Actions (Buyback, Takeovers, Delisting, etc)	e-DIS
Mutual Fund & Rights Entitlement Sell transactions	CDSL TPIN & OTP

**Existing PoAs will continue to remain valid till the time you revoke the same.**

If you have not submitted your POA, and do not wish to submit POA/DDPI – You can continue trading the way you currently do, which means:

- You need to authorize your sell transactions using CDSL TPIN and OTP
- For any Corporate Actions (Buyback, Takeovers, Delisting, etc) – you will need to complete the settlement via e-DIS

**Would you like to Proceed with DDPI/POA activation ?**

Yes    No

NEXT

## Review PDF

- View PDF and check thoroughly that all details are correct. Once you confirm and you can't edit.
- Download the PDF for your records.


WA Wealthstreet Admin

←
**VIEW PDF**



FRONT\_PG\_F

# Individual



## Account Opening Form



The Financial Engineers



DOWNLOAD PDF
PROCEED TO ESIGN

**>>> Esign**

- Enter Aadhaar number and verify with OTP

<b>ASP Name</b>	Wealthstreet Financial Services Private Limited
<b>Transaction ID</b>	UKC:eSign:6612:20230403130801822
<b>Date &amp; Time</b>	2023-04-03T13:08:08

I hereby authorize Protean eGov Technologies Limited (Protean) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of the purpose of Digitally signing of documents for Opening of Demat and Trading Account / Mutual fund Investment account for/with Wealthstreet Financial Services Private Limited and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of the purpose of Digitally signing of documents for Opening of Demat and Trading Account / Mutual fund Investment account for/with Wealthstreet Financial Services Private Limited.
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean and the data will be stored by Protean till such time as mentioned in guidelines from UIDAI from time to time.

Enter OTP

•••••

👁️

Verify OTP

Cancel

Resend OTP

**Success!** otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID.  
Download Instructions to generate Virtual ID in form of Aadhaar

## Your Application is Successful !



**APPLICATION SUBMITTED!**

Your application is being reviewed.

Upon activation of your account, your trading account user ID and password will be sent to your registered email.

[Download PDF](#)

Your application request will be reviewed.

Upon activation of your account, your trading account user ID and password will be sent to your registered email.

## Case 2,3,4

If you prefer to use the address retrieved from KRA that is different from your Aadhaar address, select **Add/Modify option** and input the address details.

You must upload a copy of the document as proof.

**REVIEW YOUR KYC DETAILS**

If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from KRA will be displayed here. If no information is retrieved, you can proceed with the available options here.

Name : \*\*\*\*\*  
Father Name : \*\*\*\*\*  
Gender : Male  
Date of Birth : \*\*\*\*\*  
Place of Birth :  
Marital Status : SINGLE  
Permanent Address : \*\*\*\*\*

**DigiLocker**      **Add/Modify Details**

You can add and update the personal and contact details

**Proof of Address**

Latest Electricity Bill Number

Latest Electricity Bill Number

Select  
AADHAAR  
Driving License  
Latest Electricity Bill  
Passport  
Voter Identity Card

Upload the scanned copy of the selected document as proof of address in the document upload section.

**CONTACT DETAILS**

Address 1      Address 2      Address 3

\*\*\*\*\*      \*\*\*\*\*      \*\*\*\*\*

Pin Code      City/Town      District      State

360002      RAJKOT      RAJKOT      Gujarat

Country      Tel. No. (Residence)

India      8000521405

**NEXT**

## ➤➤➤ Review your KYC details – Add/ Modify Details

**Case 2** where all details are correct and You'd like to update a different address proof then continue with **Add/Modify Option**.

**Case 3** where For any edits in the displayed data continue with **Add/Modify Option** irrespective of the address proof choice. You can update any address proof including Aadhaar

**Case 4** where If no information is retrieved, you proceed with the **Add/Modify Option**.



### REVIEW YOUR KYC DETAILS

If you have previously completed KYC for a DMAT or Mutual Fund account, the information retrieved from KRA will be displayed here.  
If no information is retrieved, you can proceed with the available options here.

Name : \*\*\*\*\*  
Father Name : \*\*\*\*\*  
Gender : Male  
Date of Birth : \*\*\*\*\*  
Place of Birth :  
Marital Status : SINGLE  
Permanent Address : \*\*\*\*\*

**DigiLocker**

**Add/ Modify Details**

## ➤➤➤ Add personal details

- For self registration select online, for referred by our partner and relationship manager choose name

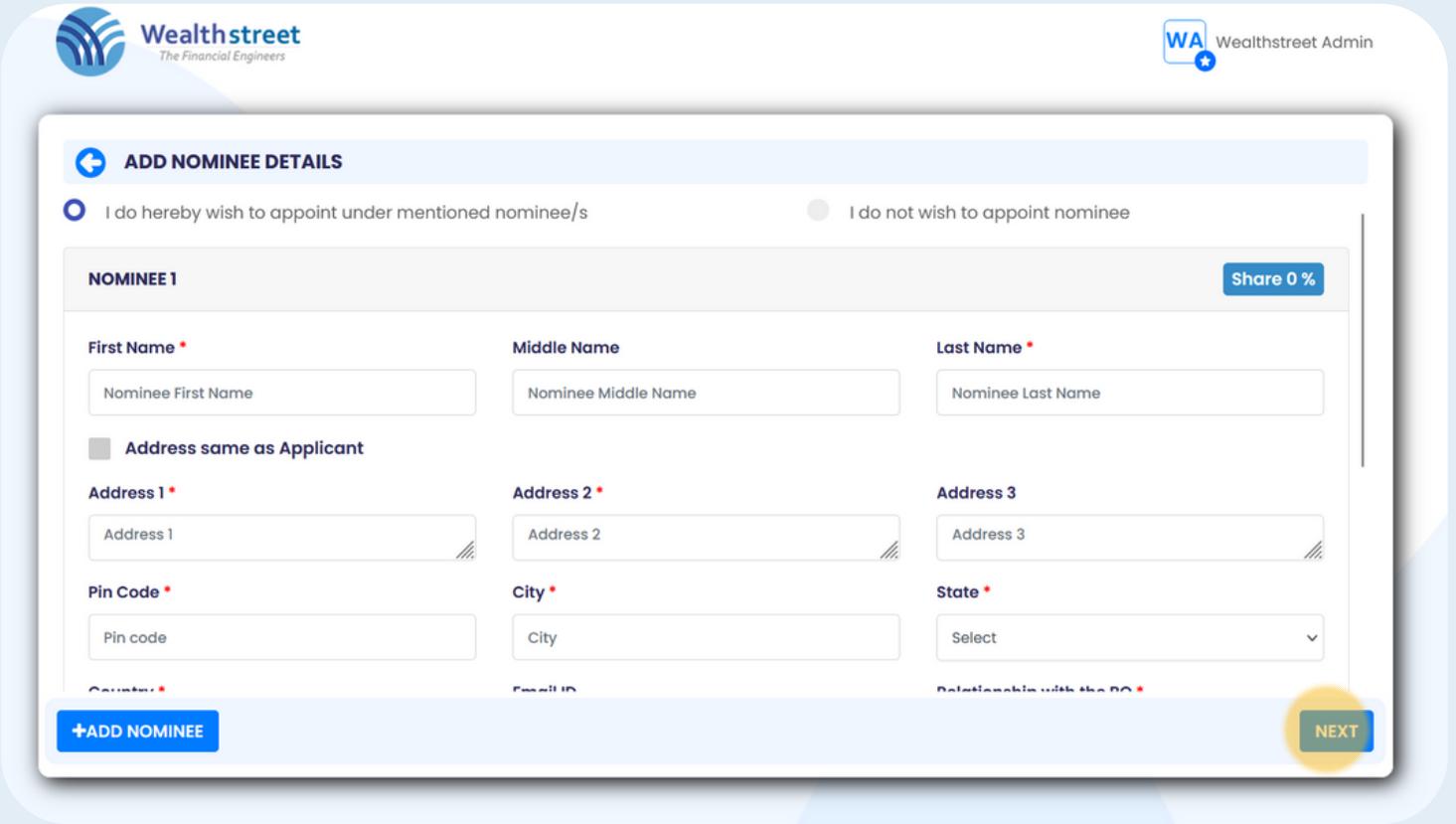
### Keep the follow

- **Proof of Identity & Pro...**  
Pan card /Unique Identification Number (Aadhaar)/Valid Driving License /Valid Passport /Voter ID
- **Proof of Bank**  
Cancel cheque (with Name Printed on cheque), if Client name not printed on cheque than Bank Passbook/Statement having latest bank entry Req along with Bank stamp or Logo.
- **Signature**  
Signature

- keep the required documents handy.

## ➤➤➤ Add Nominee details

- Nominee is compulsory for Equity Segment



**ADD NOMINEE DETAILS**

I do hereby wish to appoint under mentioned nominee/s  I do not wish to appoint nominee

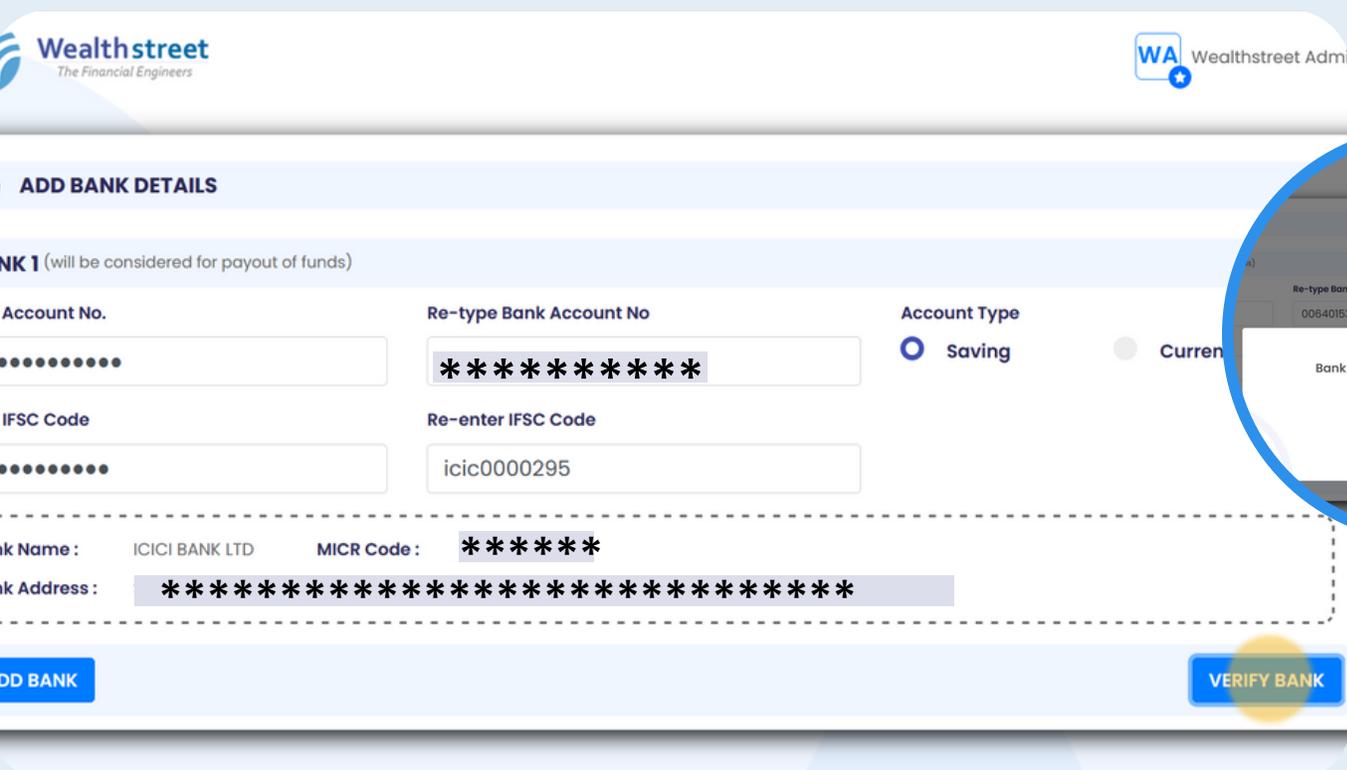
**NOMINEE 1** Share 0 %

Address same as Applicant

**+ADD NOMINEE** **NEXT**

## ➤➤➤ Add Bank details

- Add and verify bank details.
- IFSC, MICR code should match with the bank proof.

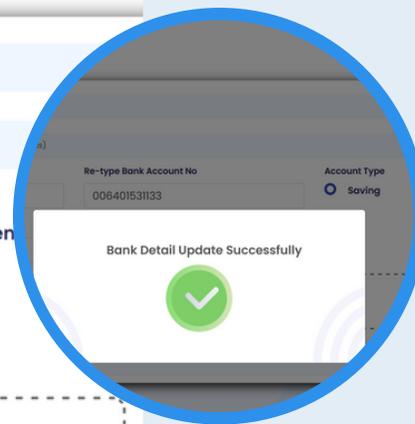


**ADD BANK DETAILS**

**BANK 1** (will be considered for payout of funds)

Saving  Current

**ADD BANK** **VERIFY BANK**



# Select Brokerage & DP Plan & confirm the disclaimer

## BROKERAGE & DP TARIFF DETAILS

### CHOOSE PLAN FOR DEMAT SERVICES

<input type="radio"/> Regular	<input type="radio"/> One Time AMC	<input checked="" type="radio"/> Life Time Free AMC
Annual Charges: RS.400/- (1st Year Free) <a href="#">View More</a>	Annual Charges: RS.1500/- <a href="#">View More</a>	Annual Charges: FREE <a href="#">View More</a>

### BROKERAGE CHARGES

	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)
Equity Cash	0.03	2.00	0.30	2.00	NA

NOTE :

## BROKERAGE & DP TARIFF DETAILS

	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)
Equity Cash	0.03	2.00	0.30	2.00	NA

### NOTE :

- We reserve the rights to change/add charges with 30 days prior notice.
- Charges/Tariffs shall be revised/ changed at WSAPL's discretion, intimation of which shall be done by E-mail/Post
- For Account opening charges/annual maintenance, cheques required Payable at Par/DD.
- All Payments should be in favour of "wealthstreet Advisors Private Limited".
- The above rates are exclusive of Stamp Duty, Exchange Transaction charges, Securities Transaction Tax, SEBI Turnover Charges and GST which will be charged extra at the rate prevailing from time to time. Further it is exclusive of any other charges/Levies that may be imposed from time to time.
- For Internet Based Trading (IBT) clients, additional charges with regard to software access etc. will be applicable as per the terms agreed at relevant point in time.

\*\*\* Subject to initial margin of minimum Rs. 2 lacs.

I/we accept above Charges Structure.

NEXT

## DISCLAIMER

- I confirm having read/been explained and understood the contents of the document on policy and procedure of the stock broker and the tariff sheet, and all voluntary / non-mandatory documents.
- I further confirm having read and understood the contents of the 'Rights and Obligations' document(s), 'Risk Disclosure Document' and 'Guidance Note' with 'Policy and Procedures' Do's and Dont's for stock and commodities segment. I do hereby agree to be bound by such provisions as outlined in these documents. I have also been informed that the standard set of documents has been displayed for information on stock broker's designated website www.wealthstreet.in.
- The rules and regulations and Bye laws 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 we agree to abide by and to be bound by the rules, regulations and bye laws 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 non-resident account, I/We also declare that I/We have complied and will continue to comply with FEMA regulations. I/We acknowledge the receipt of copy of the document, "Rights and Obligations of the Beneficial Owner and Depository Participant".

I confirm above Declaration

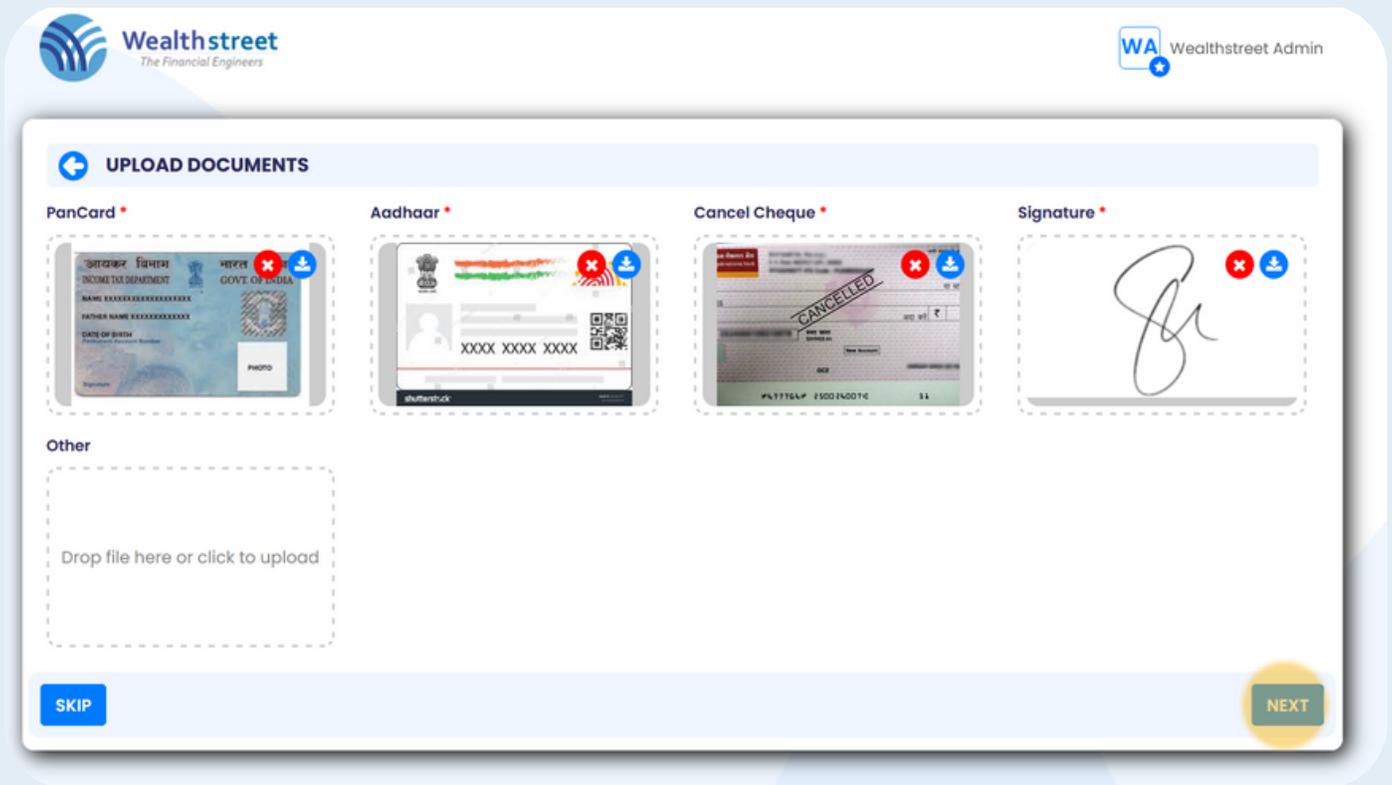
I accept default Preference for Standing Instructions / other details / Email-SMS alert / Contract note.

I confirm and understand that my name as per the IT Department will be taken as my default Wealthstreet account name, in case there is a mismatch of my name as per the IT department and my name as per the KRA database/Aadhaar/Bank account. I further confirm that the linked bank accounts, Aadhaar, and PAN belong to me.

NEXT

## »»» Upload Documents

- Upload PAN, Aadhar, Cancelled Cheque and Signature. Signature must be on a blank page.



The screenshot displays the 'Upload Documents' section of the Wealthstreet Admin interface. It features four document upload slots: PanCard, Aadhaar, Cancel Cheque, and Signature. Each slot contains a representative image of the document type. Below these slots is an 'Other' section with a dashed border and the text 'Drop file here or click to upload'. At the bottom left is a 'SKIP' button, and at the bottom right is a 'NEXT' button. The top left of the interface shows the Wealthstreet logo, and the top right shows the user 'Wealthstreet Admin'.

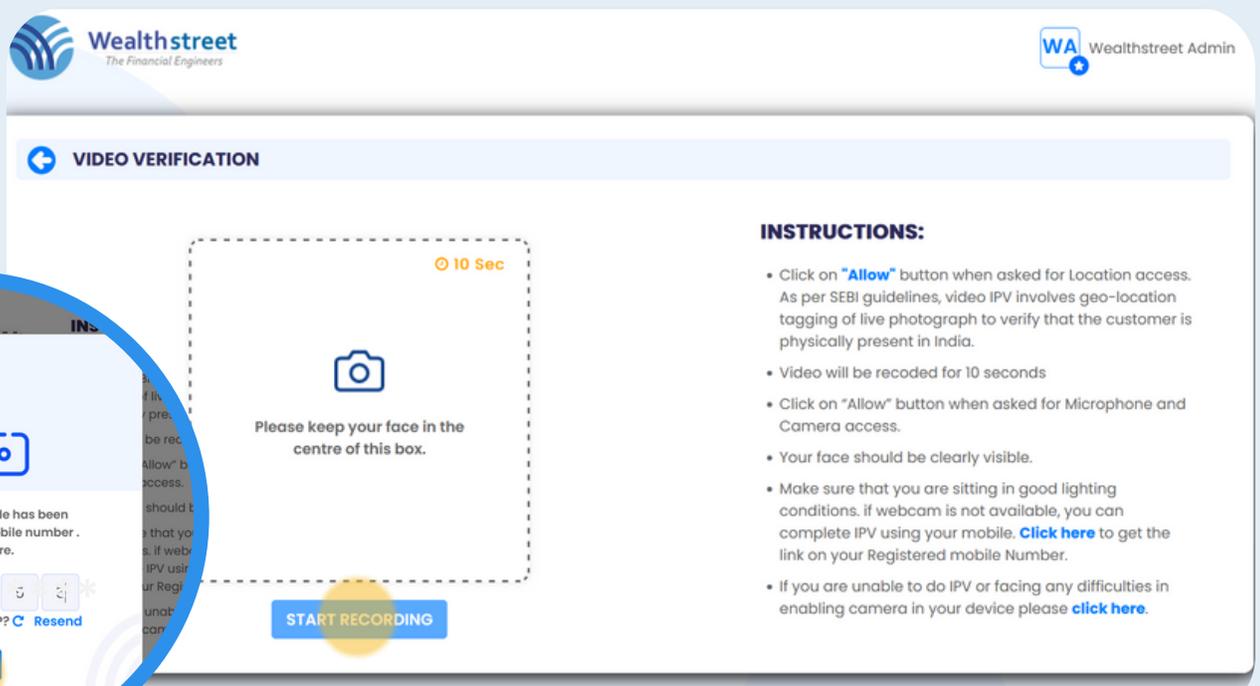
- Only RM & Partners can skip the document upload

## >>> Video Verification

### Instructions:

- Click on "Allow" button when asked for Location access. As per SEBI guidelines, video IPV involves geo-location tagging of live photograph to verify that the customer is physically present in India.
- Video will be recorded for 10 seconds
- Click on "Allow" button when asked for Microphone and Camera access.
- Your face should be clearly visible.
- Make sure that you are sitting in good lighting conditions. if webcam is not available, you can complete IPV using your mobile. Click here to get the link on your Registered mobile Number.
- If you are unable to do IPV or facing any difficulties in enabling camera in your device please click here.
- Retake the picture if the eyes are closed and save.

Proceed with Video Verification and enter OTP



**WEALTHSTREET**  
The Financial Engineers

WA Wealthstreet Admin

### VIDEO VERIFICATION

10 Sec

Please keep your face in the centre of this box.

**INSTRUCTIONS:**

- Click on "Allow" button when asked for Location access. As per SEBI guidelines, video IPV involves geo-location tagging of live photograph to verify that the customer is physically present in India.
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- If you are unable to do IPV or facing any difficulties in enabling camera in your device please [click here](#).

**CONFIRM**

**START RECORDING**

A 6-digit verification code has been sent to your registered mobile number. Please enter here.

5 5 5 5 5 5

Didn't receive OTP? [Resend](#)

## »» DDPI

### Proceed with DDPI/POA activation

←
**DDPI**

You can use DDPI to authorize Wealthstreet to access your demat account only to meet pay-in obligations for settlement of trades executed by you.

The use of DDPI will be limited only for two purposes:

- To transfer securities held in your account towards stock exchange related deliveries or settlement obligations
- To pledge/re-pledge securities

**Post DDPI, please follow the below guidelines for authorization of other transactions:**

Type of Transaction	Post DDPI, Authorized via
Corporate Actions (Buyback, Takeovers, Delisting, etc)	e-DIS
Mutual Fund & Rights Entitlement Sell transactions	CDSL TPIN & OTP

**Existing PoAs will continue to remain valid till the time you revoke the same.**

If you have not submitted your POA, and do not wish to submit POA/DDPI – You can continue trading the way you currently do, which means:

- You need to authorize your sell transactions using CDSL TPIN and OTP
- For any Corporate Actions (Buyback, Takeovers, Delisting, etc) – you will need to complete the settlement via e-DIS

**Would you like to Proceed with DDPI/POA activation ?**

Yes     No

NEXT

## »» Review PDF

- View PDF and check thoroughly that all details are correct. Once you confirm and you can't edit.
- Download the PDF for your records.


WA Wealthstreet Admin

←
**VIEW PDF**



FRONT\_PG\_F

# Individual



## Account Opening Form



DOWNLOAD PDF

PROCEED TO ESIGN

**>>> Esign**

- Enter Aadhaar number and verify with OTP

<b>ASP Name</b>	Wealthstreet Financial Services Private Limited
<b>Transaction ID</b>	UKC:eSign:6612:20230403130801822
<b>Date &amp; Time</b>	2023-04-03T13:08:08

I hereby authorize Protean eGov Technologies Limited (Protean) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of the purpose of Digitally signing of documents for Opening of Demat and Trading Account / Mutual fund Investment account for/with Wealthstreet Financial Services Private Limited and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of the purpose of Digitally signing of documents for Opening of Demat and Trading Account / Mutual fund Investment account for/with Wealthstreet Financial Services Private Limited.
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean and the data will be stored by Protean till such time as mentioned in guidelines from UIDAI from time to time.

Enter OTP

**Success!** otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID.  
[Download Instructions](#) to generate Virtual ID in form of Aadhaar

## Your Application is Successful !



**APPLICATION SUBMITTED!**

Your application is being reviewed.

Upon activation of your account, your trading account user ID and password will be sent to your registered email.

[Download PDF](#)

Your application request will be reviewed.

Upon activation of your account, your trading account user ID and password will be sent to your registered email.