



## *iwealth*

## **Online Demat Account Opening**

## Step-by-step KYC Process



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



Stock Broking



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





, 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

SIGN UP TO OPEN AN	ONLINE DEMAT AND TRAD	DING ACCOUNT
*******		
********	k	******
		OTP Verified Successfully
*****	****	*****
		OTP Verified Successfully

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

SIGN UP TO OPEN AN ONLINE D	DEMAT AND TRADING	ACCOUNT		
******				
*****		****	0	
		OTP Verified Suc	cessfully	
*******		555555	6	
		stul.	18	
••••••			_	

- 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 Wea	lthstreet Ad	min
														Add New I	KYC Entry
		Nealth The Financi	nstreet		Client			Accou	nt	tolder	туре 🕴	Last Change	Autho Id 🍦	Status	Remark
Show 10	v entries										Equity Trading	12 Apr 2023 12:11PM			
Edit	Delete	File <sup>‡</sup>	PAN No.	Client Id	Client Name	Account Opening	Holder 🎈	туре	Last Change		Equity	12 Apr 2023	Wealthstreet	IPV	test
Ø						Online	1	Equity Trading	12 Apr 2023 12:11PM		Trading	12:53PM	Admin	Pending	
8						Online	1	Equity Trading	12 Apr 2023 12:53PM		Equity Trading	12 Apr 2023 1:16PM			
Ø	Û				1	Online	1	Equity Trading	12 Apr 2023 1:16PM						
Showing 1	l to 3 of 3 ent	ries			L					F		F	irst Previous	1 Ne	ext Last





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

- Enter your PAN (only for individuals, in case of nonindividuals, contact us at 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)
- Confirm to authorize Wealthstreet to fetch my data from the KYC Registration Agency (KRA)
- Click on FETCH DATA

LET 5 GET STARTED	to investing account,	your KYC details will be fetched from KRA.
PAN *	INDIVIDUAL	Date of Birth *
* * * * * * * * *		*****
<ul> <li>I hereby authorize W (KRA)</li> </ul>	'ealthstreet to fetch n	ny data from the KYC Registration Agency
	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

The Financial Engineer	s S				
REVIEW YOUR KYC DE	TAUS				
KETER FOOR RED DE					
If you have previously comple	eted KYC for a DMAT or N	Autual Fund account, the	information retrieve	ed from KRA will be d	
If no information is retrieved,	you can proceed with th	e available options here.			
Name :	******	* * * * *			
Father Name :	****				
Gender :	Male				
Date of Birth :	*****				
Place of Birth :					
Marital Status :	SINGLE				
Permanent Address :	****	*****	* * * * * * * * * * *	****	
		Digiloc	Zor	Add/ Modi	fv D

#### Address Proof & Information Update Options

- **Case 1:** All details are correct and You'd like to update the current address same as your <u>Aadhar Address</u> then continue with <u>Digilocker</u>.
- Case 2: All details are correct and You'd like to update a <u>different address proof</u> then continue with Add/ Modify Option.
- Case 3: <u>For any edits</u> 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 DE	TAILS			
If you have previously comple	eted KYC for a DMAT or I	Mutual Fund account, the	e information	retrieved fro
If no information is retrieved, y	you can proceed with th	ne available options here	э.	
Namo	{{EullName}}			
Father Name :	{{FatherName}}			
Gender :	{{Gender}}			
Date of Birth :	{{DOB}}			
Place of Birth :	{{BirthPlace}}			
Marital Status :	{{MaritalStatus}}			
Permanent Address :	{{PAdress}}	DigiLocke		Add/ I





#### >>> Review your KYC details - DigiLocker

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

<b>REVIEW YO</b>	UR KYC DE	TAILS				
If you have previ	iously comple	ted KYC for a DMAT or	Mutual Fund	account, the info	ormation retrieved from KR	A will b
If no information	is retrieved, y	ou can proceed with t	he available	options here.		
	Name :	*******	****			
Fa	ther Name :	*****				
	Gender :	Male				
D	ate of Birth :	*****				
Plo	ace of Birth :					
Ма	rital Status :	SINGLE				
		*****	*****	******	* * * * * * * * * * * * * * *	

- 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

	Wealth street Secured by	digio
If you have previously completed KYC fo		PW.
If no information is retrieved, you can pr	E Constantia Constanti	
Name : SUNNY J		Skip
Father Name :	Digilocker KYC	
Gender:	Your KYC information from Digilocker will be fetched automatically once you enter Aadhar deta	ails.
Date of Birth : 2	I provide my consent to share my Aadhaar Number, Date of Birth and Name from my Aadhaar eKYC information w     Income Tay Dependence All States for the surgery of faithing my DNN (offention Dependence).	ith the
Place of Birth :	income tax Department, All States for the purpose of tetching my PAN Verification Record into LigitLocker.	
Marital Status :		
Permanent Address : Same S		RAT
		aar as Address Proof".
Address proof		ct Aadhaar as Address Proof".
		ar card as proof of address and th
	By proceeding further I hereby authorize Digio to pull my documents from Digilocker and share with Rakshamitra	s, select "Select Address Proof" and

• Enter Aadhaar number, captcha code and OTP

Accounts   DigitLocker   Free, Secure, Flexible and easy-to-use application — Moz. —		Wealthstreet		
Https://accounts.digitallocker.gov.in/oauth_partner/register/%252Foa	2) =	The Financial Engineers	🕹 Accounts   DigiLocker   Free, Secure, Flexible and easy-to-use application — N	Moz — 🗆
MeriPehchaan			C A ov https://accounts.digitallocker.gov.in/oauth_partner/send	d_otp කි ච්
	aw.	REVIEW YOUR KYC DETAILS	MeriPehchaan	
		If you have previously completed KYC fo	by G2	
Digiotech Solutions Private Limited		If no information is retrieved, you can pr	DigiLocker	
You are about to link your DigiLocker		Name: SUMMY J	Digiotech Solutions Private Limite	ed
account with Digiotech Solutions Private		Father Name : J/		
Limited application of Digiotech Solutions		Gender: M	UIDAI has sent a temporary OTP to your	
Pvt. Ltd You will be signed up for DigiLocker		Date of Birth: 24 2	mobile ending in ******4341(valid for 10	
account if it does not exist.	DAT	Place of Birth :		
478363756010	RAI	Marital Status : Si	•••••	ø
470502750015		Permanent Address : S/O MAR	Wait few minutes for the OTP.	
Please enter the following text in the box	aar as A		do not refresh or close!	
below:	et Aad			
Bal Cine BalCine		Address proof		
Unable to read the above image? The another	ar cara		Continue	
onable to read the above imager ity another				_
			Return to Digiotech Solutions Private Limi	ited
Next				
Return to Digiotech Solutions Private Limited	s, select			
······		Select Address proof		





#### • Enter your 6-digit DigiLocker pin.

The Financial Engineers	Sccounts   DigiLocker   Free, Secure, Flexible and easy-to-use application — Moz	-		×	Wedithstreet Admin
	O A https://accounts.digitallocker.gov.in/oauth_partner/verify_otp	☆	பி	≡	
REVIEW YOUR KYC DETAILS If you have previously completed KYC for If no information is retrieved, you can pr	MeriPehchaan DigiLocker				эw.
Name : SUNNY , Father Name : Gender : Gender : Date of Birth : Place of Birth : Marital Status : Permanent Address : Select Aadhaar as Address proof	You are already registered with DigiLocker. Please enter your 6 digit DigiLocker Security PIN 6 digit security PIN* 6 Gigit security PIN? Forgot security PIN? Continue Return to Digiotech Solutions Private Limited				RAT bar as Address Proof". Int Aadhaar as Address Proof". or card as proof of address and the
Select Address proof					a, select "Select Address Proof" and

 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.

io   Secure, Legal, Digital signing — Mozilla Firefox — 🛛 🗙				
A ≅ https://ext.digio.in/#/gateway/ekyc?code=408a8d10226a8070e€ කු හි ≡				
Wealthstreet Secured by dglo	ew.			
2 DigiLocker		Wealth street The Financial Engineers		
Skip Digilocker KYC ur KYC information from Digilocker will be fetched automatically once you enter Aadhar details.		G UPLOAD DOCUMENTS		
Fetching documents	RAT har as Address Proof". ht Aadhaar as Address Proof". hr card as proof of address and the	PanCard •	Acdhoor*	Cancel Cheque •
Authenticate Aadhaar				





### >>> Add personal details

Mother's Name			
Mother's Name			
Occupation	Income details	Investment / Trading Experience	
Private Sector Service 🗸 🗸	One To Five Lakhs (100000 to 500001 v	No	~
Mobile Number	Belongs To	Email ID	Belongs To
****	Select v	*****	* *Select
Birth Place			
Birth Place			
Sirth Place			

• For self registeration select online, for referred by our partner and relationship manager choose name

Wealthstreet The Financial Engineers	WA Wealthstreet Admin
ADD PERSONAL DETAILS	
Referred by	Our Relationship Manager
CHOOSE SEGMENT Equity Cash (NSE,BSE) Currency (NSE,BSE) Commodity (	(Demat Mode) Mutual Fund (Physical Mode) Derivatives (NSE) (MCX)
Keep the following documents ready!	NEXT
<ul> <li>Proof of Bank         <ul> <li>Cancle cheque (with Name Printed on cheque), if Client name not printed on cheque than Bank</li> <li>Passbook/Statement having latest bank entry Req along with Bank stamp or Logo.</li> </ul> </li> <li>Signature         Signature     </li> </ul>	<ul> <li>keep the required documents handy.</li> </ul>





#### Add Nominee details >>>

Nominee is compulsory for Equity Segment

ADD NOMINEE DETAILS				
I do hereby wish to appoint u	nder mentioned nominee/s	I do not w	ish to appoint nominee	
NOMINEE 1				Share 0 %
First Name *	Middle Name		Last Name *	
Nominee First Name	Nominee Middle Name		Nominee Last Name	
Address same as Applica	ht			
Address 1 *	Address 2 *		Address 3	
Address 1	Address 2	li.	Address 3	11.
Pin Code *	City *		State *	
Pip code	City		Select	~

#### >>> Add Bank details

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

Wealthstreet The Financial Engineers			WA Wealthstreet Ad	mi	
ADD BANK DETAILS					
Account No.	Re-type Bank Account No          ********         Re-enter IFSC Code         icic0000295	Account Type Saving	Curren Bo	Isank Account No JIS31133 nk Detail Update Successfully	Account Type Saving
ak Name : ICICI BANK LTD MICR Code ak Address : **********************************	****** ********				





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

BROKERAGE &	DP TARIFF DETAILS					
OOSE PLAN FOR D	EMAT SERVICES				1	
Regular		One Time AMC		O Life Time Free A	мс	
nnual Charges	RS.400/- (1st Year Free) View More	Annual Charges	RS.1500/-	Annual Charges	FREE View More	
OKERAGE CHARGI	ES					
	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)	
quity Cash	0.03	2.00	0.30	2.00	NA	
ATE -	Wealth: The Financial	street Engineers				WA Wealthstreet Ac
	G BROKERAG	E & DP TARIFF DETAILS				per lot)
						P.01.101/
	Equity Cash NOTE: • We reserve the i • Charges/Tariffs • For Account ope • All Payments sh	0.03 rights to change/add charges v shall be revised/ changed at W ening charges/annual mainten ould be in favour of "wealthstre	2.00 with 30 days prior notice. /SAPL's discretion, intimation ance, cheques required Pay et Advisors Private Limited".	of which shall be done by E- able at Par/DD.	2.00 mail/Post	NA
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#### >>>> Upload Documents

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

Wealth street The Financial Engineers			Wealthstreet Admin
COVE OF YORK	Aadhaar •	Cancel Cheque *	Signature •
Other Drop file here or click to uploa	d		
SKIP			NEXT

• 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





#### DDPI >>>

### Proceed with DDPI/POA activation

ou can use DDPI to authorize Wealthstreet to access your demat account only to meet pa he use of DDPI will be limited only for two purposes: • To transfer securities held in your account towards stock exchange related deliveries or • To pledge/re-pledge securities	y-in obligations for settlement of trades executed by you. settlement obligations
ost DDPI, please follow the below guidelines for authorization of other transa	ictions:
Type of Transaction	Post DDPI, Authorized via
Corporate Actions (Buyback, Takeovers, Delisting, etc)	e-DIS
Mutual Fund & Rights Entitlement Sell transactions	CDSL TPIN & OTP
xisting PoAs will continue to remain valid till the time you revoke the same. you have not submitted your POA, and do not wish to submit POA/DDPI – You can continu • You need to authorize your sell transactions using CDSL TPIN and OTP • For any Corporate Actions (Buyback, Takeovers, Dellsting, etc) – you will need to compl	ue trading the way you currently do, which means: lete the settlement via e-DIS
Vould you like to Proceed with DDPI/POA activation ?	
🕽 Yes 🔵 No	

#### >>> 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.









#### • Enter Aadhaar number and verify with OTP

ASP Name	Wealthstreet Financial Services Private Limited
Transaction ID	UKC:eSign:6612:20230403130801822
Date & Time	2023-04-03T13:08:08
I hereby authorize Protean eGov Technologies Limited	d (Protean) to -
1. Use my Aadhaar / Virtual ID details (as applicable) for Demat and Trading Account / Mutual fund Investment as my identity through the Aadhaar Authentication system the Aadhaar (Targeted Delivery of Financial and other S notified thereunder and for no other purpose.	or the purpose of the purpose of Digitally signing of documents for Opening o ccount for/with Wealthstreet Financial Services Private Limited and authenticate (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions o Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations
2. Authenticate my Aadhaar / Virtual ID through OTP of system for obtaining my e-KYC through Aadhaar based Gender, Date of Birth and Address) for the purpose of th Account / Mutual fund Investment account for/with Wea	or Biometric for authenticating my identity through the Aadhaar Authentication I e-KYC services of UIDAI and use my Photo and Demographic details (Name, he purpose of Digitally signing of documents for Opening of Demat and Trading Ithstreet Financial Services Private Limited.
3. I understand that Security and confidentiality of pers ensured by Protean and the data will be stored by Protea	onal identity data provided, for the purpose of Aadhaar based authentication is an 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.	- JL

#### Your Application is Successful !

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 K	YC DE	TAILS			
If you have previously	complet	ted KYC for a DMAT or I	Mutual Fund account,	the information	retrieved from KRA will be
If no information is ret	trieved, y	ou can proceed with th	he available options h	iere.	
	Name :	****	****		
Father M	Name :	****			
Ge	ender :	Male			
Date of	f Birth :	****			
Place of	f Birth :				
Manital C	Status :	SINGLE			
Maritais					

You can add and update the personal and contact details

Proof of Address	1	Latest Electricity Bill Number	r		
Latest Electricity Bill	~	Latest Electricity Bill Number			
Select AADHAAR					
Driving License					
Latest Electricity Bill					
r assburr					
Voter Identity Card	rselected document as proof	of address in the document up	oload section.	Address 3	
Voter Identity Card	serected accument as proof	of address in the document up Address 2	aload section.	Address 3	al a la al a la al al al al al al al al
CONTACT DETAIL Address 1 ***********	л зынастиа ассилиент as proof \$ \$ \$/₩,₩+	of address in the document up Address 2 رویک کی کاریک کی کاریک کاری	کاممط section. ** * * *	Address 3 للاريكية المجارية المحافظة ال	*****
Voter Identity Card CONTACT DETAIL Address 1 *:*** *:* *:*	sevected accument as proof s */**/*H City/Town	of address in the document up Address 2 بهت بهن بهنایک تهن م	مادمط section. ** الله الله الله الله الله الله الله ال	Address 3 به:به:۲۵۰۲ میر State	*****
CONTACT DETAIL Address 1 ***** ******************************	sevected accument as proof s total accument as proof s total accument as proof s city/Town RAJKOT	of address in the document up Address 2 **R** *: *1*T*G	oload section. ** ** * District RAJKOT	Address 3 * الله الله الله الله الله الله الله الل	<b>*:*:*:* *</b> //
Voter Identity Card         CONTACT DETAIL         Address 1         *:***********************************	s	of address in the document up Address 2 به به به به به ابه ۲۴۵ ه ence)	oload section. ** ** * District RAJKOT	Address 3	***** //





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

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

**Case 3 where <u>For any edits</u>** 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 DE	TAILS	
If you have previously comple	ted KYC for a DMAT or Mutual Fund account, the information retrieved from KRA	will be
If no information is retrieved, y	ou can proceed with the available options here.	
Name :	****	
Father Name :	* * * * * * * * * *	
Gender :	Male	
Date of Birth :	****	
Place of Birth :		
Marital Status :	SINGLE	
Permanent Address :	****************	





### >>> Add personal details

Mother's Name			
Occupation	Income details	Investment / Trading Experience	
Private Sector Service 🗸 🗸	One To Five Lakhs (100000 to 500001 $\vee$	No	~
Mobile Number	Belongs To	Email ID	Belongs To
* * * * * * * *	Select v	* * * * * * * * * *	<* * Select
Birth Place			
Birth Place			
Are you Politically Exposed Person (PEP	) or Pelated to a PEP 2		

• For self registeration select online, for referred by our partner and relationship manager choose name

	Wealth street The Financial Engineers	WA Wealthstreet Admin
ADD PERSO	ONAL DETAILS	
Referred by		
Online	Our Partner Our Relationship Manager	
	CHOOSE SEGMENT         Equity Cash (NSE,BSE)         Currency (NSE,BSE)         Currency (NSE,BSE)    Commodity (MCX)	Derivatives (NSE)
Keep the follov		NEXT
<ul> <li>Proof of Identity &amp; Pru Pan card /Unique I Driving License /Vo</li> <li>Proof of Bank Cancle cheque (wi name not printed o Passbook/Stateme with Bank stamp o</li> <li>Signature Signature</li> </ul>	dentification Number (Aadhaar)/Valid Ilid Passport /Voter ID th Name Printed on cheque), if Client on cheque than Bank ent having latest bank entry Req along r Logo.	ed documents handy





#### Add Nominee details >>>

• Nominee is compulsory for Equity Segment

I do hereby wish to appoint under mentione	d nominee/s	I do not	wish to appoint nominee	
NOMINEE 1				Share 0 %
First Name *	Middle Name		Last Name *	
Nominee First Name	Nominee Middle Name		Nominee Last Name	
Address same as Applicant				
Address 1 *	Address 2 *		Address 3	
Address 1	Address 2	11	Address 3	1.
Pin Code *	City •		State *	
Pin code	City		Select	~

#### >>> Add Bank details

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

Wealthstreet The Financial Engineers			WA Wealthstreet Admi.
ADD BANK DETAILS			
Account No.	Re-type Bank Account No          * * * * * * * * * *         Re-enter IFSC Code         icic0000295	Account Type Saving	Curren Bank Detail Update Successfully
Ak Name : ICICI BANK LTD MICR Code Ak Address : **********************************	e: <b>****</b> * *******	*	VERIFY BANK





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

RROKERAGE						
DOSE PLAN FOR D	DEMAT SERVICES					
Regular		One Time AMC		O Life Time Free A	мс	
nual Charges	RS.400/- (1st Year Free) View More	Annual Charges	RS.1500/- View More	Annual Charges	FREE View More	
KERAGE CHARG	ES					
	Trading/Intra day	Trading Minimum	Delivery	Delivery Minimum	Minimum (per Options contract Rs. per lot)	
uity Cash	0.03	2.00	0.30	2.00	NA	
NTE .	Wealth The Financial	<b>street</b> Engineers				WA Wealthstreet Ad
	G BROKERAG	E & DP TARIFF DETAILS	.,		bontory manada	per lot)
	Equity Cash	0.03	2.00	0.30	2.00	NA
	NOTE: • We reserve the i • Charges/Tariffs	rights to change/add charges shall be revised/ changed at	s with 30 days prior notice. WSAPL's discretion, intimation	n of which shall be done by E-	mail/Post	
	NOTE : • We reserve the i • Charges/Tariffs • For Account ope • All Payments sh • The above rates the rateprevallin • For Internet Base •••• Subject to initia	rights to change/add charges shall be revised/ changed at ening charges/annual mainte iould be in favour of "wealthstr s areexclusive of Stamp Duty, I ng from time to time. Further li ed Trading (IBT) clients, additi al margin of minimum Rs. 2	s with 30 days prior notice. WSAPL's discretion, intimatior nance, cheques required Pay reet Advisors Private Limited'. Exchange Transaction charge t is exclusive of any oher char ional charges with regard to s <b>lacs.</b>	n of which shall be done by E- able at Par/DD. Ins, Securities Transaction Tax, ges/Levies that may be impo oftware access etc. will be ap	mail/Post SEBI Turnover Charges and GST v sed from time to time. oplicable ad per the terms agreed	vhich will be charged extra at d at relevant point in time.
Wealthst The Financial En	NOTE: • We reserve the e • Charges/Tariffs • For Account ope • All Payments sh • The above rates the rateprevailin • For Internet Base •••• Subject to initia vilue accept of	rights to change/add charges shall be revised/ changed at ening charges/annual mainte iould be in favour of "wealthstr s areexclusive of Stamp Duty, I ng from time to time. Further it ed Trading (IBT) clients, additi al margin of minimum Rs. 2 above Charges Structure.	s with 30 days prior notice. WSAPL's discretion, intimatior nance, cheques required Pay reet Advisors Private Limited". Exchange Transaction charge t is exclusive of any oher char ional charges with regard to s	n of which shall be done by E- able at Par/DD. es, Securities Transaction Tax, ges/Levies that may be impo ioftware access etc. will be ap	maii/Post SEBI Turnover Charges and GST v sed from time to time. splicable ad per the terms agreed www. Wealthstreet Adm	vhich will be charged extra at d at relevant point in time.





#### >>>> Upload Documents

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

Wealthstreet The Financial Engineers			WA Wealthstreet Admin
	Andharat	Ormani Ohanun t	ĉirantura <b>k</b>
HIRE DISCONTINUES			
Other Drop file here or click to upload			
SKIP			NEXT

• 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





#### DDPI >>>

### Proceed with DDPI/POA activation

ou can use DDPI to authorize Wealthstreet to access your demat account only to meet pa he use of DDPI will be limited only for two purposes: • To transfer securities held in your account towards stock exchange related deliveries or • To pledge/re-pledge securities	iy-in obligations for settlement of trades executed by you. r settlement obligations
ost DDPI, please follow the below guidelines for authorization of other transc	actions:
Type of Transaction	Post DDPI, Authorized via
Corporate Actions (Buyback, Takeovers, Delisting, etc)	e-DIS
Mutual Fund & Rights Entitlement Sell transactions	CDSL TPIN & OTP
xisting PoAs will continue to remain valid till the time you revoke the same. you have not submitted your POA, and do not wish to submit POA/DDPI – You can continu • You need to authorize your sell transactions using CDSL TPIN and OTP • For any Corporate Actions (Buyback, Takeovers, Delisting, etc) – you will need to comp	ue trading the way you currently do, which means: lete the settlement via e-DIS
Vould you like to Proceed with DDPI/POA activation ?	
🕽 Yes 🔵 No	

#### >>> 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.









#### • Enter Aadhaar number and verify with OTP

ASP Name	Wealthstreet Financial Services Private Limited			
Transaction ID	UKC:eSign:6612:20230403130801822			
Date & Time	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.	- #			

#### Your Application is Successful !

Application is being reviewed.	
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.