

A) STEP BY STEP GUIDE FOR ACCOUNT OPENING

• OFFLINE ACCOUNT OPENING STEPS:

Welcome to **INVESTERIA FINANCIAL SERVICES PRIVATE LIMITED**. your trusted partner for seamless Demat and Trading account openings. We understand that initiating your trading journey is a significant step. Here's a detailed step-by-step guide for offline account opening with us:

Step 1: Gather Essential Documents Collect vital documents, including your PAN card, proof of address, proof of income (if applicable), bank account details, recent passport-size photographs, and trading preference details.

Step 2: Obtain Account Opening Forms Download the account opening forms from our official website or pick them up directly from our head office.

Step 3: Fill in Account Opening Forms Thoroughly fill out the account opening forms, providing accurate information. Specify your trading preferences for specific market segments.

Step 4: Select Trading Preferences Indicate your trading preferences by selecting the desired market segments (e.g., equities, derivatives, commodities). If you choose not to trade in a particular segment, kindly mark accordingly and sign.

Step 5: Nomination Process Ensure the security of your investments by completing the nomination process. This step safeguards your holdings for the future.

Step 6: Sign the Forms Review the forms, sign where required, and acknowledge your agreement with our terms and conditions.

Step 7: Attach Necessary Documents Attach photocopies of the necessary documents, including proof of identity, address, income, bank account details, PAN card, and photographs.

Step 8: Visit Our Head Office Pay a visit to our head office to submit the completed forms and documents for verification.

Step 9: Undergo Personal Verification Undergo a personal verification process, which may involve a face-to-face meeting or video verification. This step ensures the validity of your identity and information.

Step 10: Application Processing Once successfully verified, we'll process your application for both the Demat and Trading accounts.

Step 11: Receive Your Account Numbers Upon successful processing, you will be issued your unique Trading account number or customer ID. This identifier is crucial for your trading activities.

Step 12: Obtain DP Debit and Pledge Instruction You'll receive the Debit and Pledge Instruction (DPDI) form. This instruction, though voluntary, empowers you to perform on-market sale, pledge, and tender offers using your holdings.

Step 13: Begin Your Trading Journey Congratulations! With your Demat and Trading accounts established, you're now poised to begin your trading journey with **INVESTERIA FINANCIAL SERVICES PRIVATE LIMITED**. Explore an extensive array of trading opportunities in the capital markets.

At **INVESTERIA FINANCIAL SERVICES PRIVATE LIMITED**, your financial prosperity and security are our prime concerns. Our comprehensive guide ensures every aspect of offline Demat and Trading account opening is covered. Your satisfaction remains our priority.

- **ONLINE ACCOUNT OPENING STEPS:**

We do not have online account opening facility.

Or Else.

Step 1: Visit Our Website

Access our official website and navigate to the "Account Opening" section. Or <https://www.investeria.in/form.html>

Step 2: Provide Personal Details

Using Mobile & Email ID, start registering yourself with us and then Enter your personal information, including your name, contact details, PAN card, Aadhaar number, and other required details.

Step 3: Choose Account Type Select the type of account you wish to open – Demat, Trading, or both.

Step 4: Video In-Person Verification (IPV) Conduct a Video IPV through your webcam or mobile camera. Our team will verify your identity and documents in real-time

Step 5: Select Trading Preferences Specify your trading preferences by choosing the desired market segments (e.g., equities, derivatives, commodities). If you choose not to trade in a particular segment, kindly indicate accordingly.

Step 6: Nomination Process Complete the online nomination process to secure your investments for the future.

Step 7: Obtain Demat Debit and Pledge Instruction: The Debit and Pledge Instruction (DPDI) form is voluntary, however it empowers you to perform on-market sale, pledge, and tender offers using your holdings without any physical slips and by secure and seamless way. You may opt for the same via online selection facility.

Step 8: Authenticate Using Aadhaar for a secure and seamless experience, we use Aadhaar-based authentication. Your details and documents will be fetched through the Aadhaar Based System or DIGILOCKER or Officially Valid Document duly e-signed as per SEBI requirement.

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Step 9: Signature E-sign Using Aadhaar E-sign the application forms digitally using your Aadhaar-based e-signature for a paperless and efficient process.

Step 10: Verification and Approval Our team will review the information provided during the online application and verify it. Once verified, your application will be approved.

Step 11: Receive Account Numbers Upon approval, you will receive your unique Trading account number or customer ID via email.

Step 13: Access Your Account You will receive login credentials to access your Trading account online.

Step 13: Begin Your Trading Journey Congratulations! With your Demat and Trading accounts set up, you're now poised to begin your trading journey with **INVESTERIA FINANCIAL SERVICES PRIVATE LIMITED**. Explore a wide array of trading opportunities in the capital markets from the comfort of your home.

At **INVESTERIA FINANCIAL SERVICES PRIVATE LIMITED**, your financial prosperity and security are our prime concerns. Our online account opening process ensures convenience, security, and efficiency. Your satisfaction remains our priority.

