



# SANCHIT FINANCIAL AND MANAGEMENT SERVICES LIMITED

CIN- U74140RJ1994PLC097929

Registered Office: U-6, Krishna Apartment, Hathi Babu Marg,  
Bani Park, Jaipur-302016 (Rajasthan)

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## Step-by-Step Guide on How to Open a Demat and Trading Account

Opening a Demat and trading account opens up a host of investing possibilities. You can open a Demat and trading account in a few simple steps:

In the first step, choose a brokerage firm to open a trading account after conducting a thorough research. Take the various charges levied by brokerages, the interface of the trading platform and the value-added services into account before finalizing a brokerage.

After selecting a broker, enquire about the trading account opening procedure. The brokerage will require you to fill up an account opening form and a Know Your Customer (KYC) form. A representative from the brokerage firm will assist you with the process.

You will also have to submit identity proof, residence proof and proof of income and bank statements. A photocopy of the Aadhar card or passport, besides several other documents, can be used as proof of residence and a copy of an Aadhar card or PAN card can be used as identity proof. The PAN card is compulsory to open a trading account.

Post submission of the documents, the brokerage will conduct a manual KYC verification. A representative may visit your house to verify the documents or an online verification will be conducted.

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If you do not want to manually verify the documents, you can opt for the e-KYC process. For the e-KYC process, your PAN card should be linked to the Aadhar card and your bank account. The mobile number submitted in the account opening form should be the same as the Aadhar card for the e-KYC process.

**It generally takes 3-4 days to activate the trading account after the completion of the verification process.**

## **FAQ FOR ACCOUNT OPENING AND ACTIVATION**

- Which type of account that can be opened with Sanchit?
  - Trading Account
- In which segments I can open an account with Sanchit?
  - Cash And F&O Segment
- Who can open a Trading account with Sanchit?
  - Individual
  - Resident Individuals
  - NRIs
  - Non-individual
  - Corporate
  - Partnership firms
  - Registered/Unregistered trust
  - Registered/Unregistered society
  - Association of Persons (AOP)
  - FII/FPI (Only Trading Account)
  - Bank

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- Mutual funds
- LLP (Limited Liability Partnership)
- What are the documents required for opening the account?

## **Resident Indian Individual account**

- Proof of Identity (PAN with photograph mandatory)
- Proof of Address (Passport/ Voters Identity Card/ Ration Card/ Registered Lease or Sale Agreement of Residence/ Driving License/ Flat Maintenance bill/ Insurance Copy /Aadhaar Letter issued by Unique Identification Authority of India./
- Telephone Bill (only land line)/ Electricity bill/
- Gas bill/Bank Account Statement/Passbook – (Not more than 3 months old – as on date of receipt for documents).
- Proof of Bank account
- Income Poof (Mandatory incase of derivatives/Currency Segment )
- Last 6 month bank statement

## How to Open an Account with Sanchit:

