



PLEASE READ THIS PAGE BEFORE YOU START SIGNING THIS FORM

Dear Partner,

Thank You for trusting Fincos Technology Solutions Private Limited as your Partner for Wealth Creation. We have started this new journey as your Portfolio Manager, and we promise to work very hard & smart to make sure you get your desired Risk-adjusted Returns.

We have made the Onboarding process very simple & it won't take more than 10 mins of your time.

In case you have any doubts, please contact at 01143708987.

#### 8 Things Needed to Open this PMS Account

1. Kindly fill the First Holder Information Sheet as per First Holder and if you want to have a Second Holder then Second Holder Information Sheet also.
2. Sign at all places as marked as mentioned on pages, with First Holder and/or Second Holder if any.
3. Please Paste 2 Photographs of First Holder and Second Holder (if any) where marked and Sign Across as shown.
4. In "Schedule C: Fees & other charges" on page 25, you need to select between Plan A or Plan B or Plan C, and sign only below the table of Plan selected.
5. On page --- below the heading Declaration, you need to write in Your Handwriting the following:-

"We have read and understood the fee/charge structure and illustration."

#### 6. Extra Documents Required:

- \* 3 Self-attested PAN Card Copies each of First Holder & Second Holder
- \* 3 Self-attested Aadhaar Card Copies each of First Holder & Second Holder
- \* 2 Photographs each of First Holder & Second Holder
- \* 1 Cancelled Cheque where First Holder name printed OR Copy of Bank Passbook First Page where First Holder Name and Details shown with Bank Stamp OR Latest Bank Statement where First Holder Name and Details shown with Bank Stamp
- \* 2 Self-attested PAN Card & Aadhaar Card Copies of Nominee (signed by nominee), if Nominee appointed
- \* 2 Self-attested PAN Card & Aadhaar Card Copies of Guardian (signed by guardian), if Nominee is Minor 7Fond Transfer

7. Please write the cheque of the investment amount in the name of:

**Fincos Technology solutions Private Limited.**

8. On Completion of Form, kindly fill the Checklist at the last page

Please put the form, Cheque, and all documents in the envelope provided and give us a call. We will schedule the pick-up for reverse courier as per your convenience.