

## List of Documents Required for Trading & Demat Account (Equity + MCX)

### Offline KYC

<b>Mandatory Documents</b> (Ear-Nose-Eyes Must be Clearly Visible)	<b>Pan Card – 1 Copy</b>
	<b>Aadhaar Card - 1 Copy</b>
	<b>Cancelled Cheque - 1 Copy</b>
	<b>Bank Statement with Last 181 Days transaction entry - 1 Copy</b> (Along with Latest transaction entry of current month)
	<b>Passport Size Photograph - 1</b>
	<b>Cheque of Rs. 1203/- in favor of "PATEL WEALTH ADVISORS PVT. LTD."</b> (Default Plan will be set as Plan - Q Rs. 950/- LTNR/- if not specified)
<b>Mandatory Information</b>	<b>Mobile No.</b>
	<b>E-mail ID in BLOCK LETTERS</b>
	<b>Applicant's Mother's Full Name</b>
<b>Optional Documents</b>	<b>Residence Address Proof - 1 Copy</b> [In case of address is other than UID or Bank Record] (Any one - Driving License/Pass Port/Election Card)
	<b>Minimum Cheque of Margin Money</b> For Intraday Exposure Rs. 50000/- and For Delivery Exposure Rs. 25000/-
	<b>If you wish to appoint Nominee in Demat A/c then</b> Nominee Photo - 1 Nominee Self attested Pan card Nominee Self attested Aadhaar card
<b>Points To Be Taken Care</b>	<ul style="list-style-type: none"><li>* Also make sure your name appears on all documents must be same as it appears on PAN CARD</li><li>* Use only black ink pen for signature across all pages of KYC.</li><li>* All documents must be self attested with black ink pen only.</li><li>* Do not fill any details on KYC Form.</li></ul>

In case of any further assistance  
☎ 8238584848 ✉ [kyc@patelwealth.com](mailto:kyc@patelwealth.com)



☎ 9998484848

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