



FINWIZARD TECHNOLOGY PRIVATE LIMITED

Account Details Addition / Modification / Deletion Request Form

CHANGE ACCOUNT DETAIL: TRADING DEMAT Date

D	D	M	M	Y	Y	Y	Y
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Application No.

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 Date

D	D	M	M	Y	Y	Y	Y
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Please fill all the details in Block Letters in English :

DP ID

1	2	0	9	2	1	0	0
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 Client ID

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Trading Account Code

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Account Holder's Details	
Name of First / Sole Holder	
Name of Second Holder	
Name of Third Holder	

- I/We request to carry out the change of correspondence/permanent address / signature in the demat /Trading account
- I/We request to carry out the change of address / signature in the KRA and demat/ Trading account

I/We request you to make the following additions / modifications / deletions to my/our account in your records.

DETAILS (Please specify change of correspondence /Permanent address, bank details, telephone number, Email ID, etc.)	Addition / Modification / Deletion (Please specify)	Existing Details	New Details

- Update Bank details as:- Primary Secondary
- In case of changes to be done in E mail address and / Or Mobile number request you to please fill attach self-declaration.

Income Range for Individuals -	<input type="checkbox"/> Below Rs. 1 Lakh	<input type="checkbox"/> Rs 1 Lakh – Rs. 5 Lakh	<input type="checkbox"/> Rs.5 Lakh -10 Lakh
	<input type="checkbox"/> Rs 10 Lakh – 25 Lakh	<input type="checkbox"/> More than 25 Lakh	
Income Range for Non Individuals -	<input type="checkbox"/> Below Rs. 1 Lakh	<input type="checkbox"/> Rs 1 Lakh – Rs. 5 Lakh	<input type="checkbox"/> Rs. 5 Lakh - 10 Lakh
	<input type="checkbox"/> Rs 10 Lakh – 25 Lakh	<input type="checkbox"/> More than 25 Lakh -1 Crore	
	<input type="checkbox"/> More than Rs. 1 crore		

Attach an Annexure (with signature(s)) if the space above is found insufficient.

Regd. Office: Queens Paradise, 1st Floor, Curve Road, Shivajinagar, Bangalore - 560051

CIN No. U74900KA2015PTC080747;

SEBI REGN:INZ000209036, CDSL IN-DP-572-2021

Website: <http://www.fisdom.com>; Email: ask@fisdom.com

Contact : 96425-96425



FINWIZARD TECHNOLOGY PRIVATE LIMITED

	First/Sole Holder	Second Holder	Third Holder
Name			
Signature			

FOR OFFICE USE ONLY

In-Person Verification (IPV Details):

Name of the person who has done the IPV : _____

Designation : _____ Employee: _____

Date of IPV : __/__/____ Signature of the person who has done the IPV Seal/Stamp of the Intermediary

*** In the absence of IPV, please provide attestation of the Bank showing the Name & Designation of the Officer who is doing the attestation on the supporting documents.**

===== (Please Tear Here) =====
Acknowledgement Receipt

ACKNOWLEDGEMENT

Received Account Details Addition / Modification / Deletions request as per details given below :

Trading UCC code									Date	D	D	M	M	Y	Y	Y	Y
DP ID	1	2	0	9	2	1	0	0	Client ID								
Name of the Sole / First Holder																	
Name of Second joint Holder																	
Name of Third joint Holder																	
Modification requested for: [Specify reason]																	

Finwizard Technology Private Limited

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FINWIZARD TECHNOLOGY PRIVATE LIMITED

Self Declaration

To,
FINWIZARD TECHNOLOGY PVT. LTD.
MUMBAI

Dear Sir,

Sub: Self declaration to accept common email id / mobile number in my KYC.

I/We (Name of account holder) hereby request Finwizard Technology Pvt. Ltd. to accept common email id i.e. _____ and / or Mobile No. _____ mentioned in my KYC as it is being commonly used by me/us under the following conditions prescribed by exchange.

Family members who include

- (a) Self,
- (b) Spouse,
- (c) Dependent children and
- (d) Dependent parents.

(b) Demat accounts with same first holder PAN but with different patterns of holding.

(c) Non-individual account: Mobile number and/ or email id of the authorized person held by the said authorized person in his/her individual capacity.

I/We hereby state and confirm that what is stated above is true and correct information. And, it shall be my/our responsibility to receive and read the communications sent by Finwizard Technology Pvt. Ltd. on the said id.

I/We agree to indemnify and keep Finwizard Technology Pvt. Ltd. indemnified at all times from and against all costs, charges, damages, penalties (including reasonable attorney fees) suffered and /or incurred by Finwizard Technology Pvt. Ltd. for any act done or omitted to be done by me/us on the above declaration.

Yours Faithfully,

CLIENT CODE/UCC CODE-

Signature of the Applicant/Authorised signatory

Date :

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