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 Type of Transaction (Please select) Change of Demat Details Change of Bank Details Change in Contact Details Change in Address

1. PMS Account Details (Mandatory)

Account Code	<input type="text"/>	PMS Strategy Name:	<input type="text"/>
Name of Sole / First Holder (First / Middle / Surname) / Name of the Entity			
<input type="text"/>			
Name of Second Holder (First / Middle / Surname) – To be filled only in case of individuals			
<input type="text"/>			
Name of Third Holder (First / Middle / Surname) – To be filled only in case of individuals			
<input type="text"/>			

2. New Demat Account Details
 NSDL CDSL

DP Name	<input type="text"/>			
DP ID	<input type="text"/>		Client ID	<input type="text"/>
Name of Sole / First Holder				
<input type="text"/>				
Name of Second Holder				
<input type="text"/>				
Name of Third Holder				
<input type="text"/>				
Proof of Demat Account (Please select any one) <input type="checkbox"/> Client Master <input type="checkbox"/> DP Statement				

3. New Bank Account Details

Name of the Bank			
<input type="text"/>			
Bank Account Number			
<input type="text"/>			
Branch Name			
<input type="text"/>			
Branch Address			
<input type="text"/>			
Account Type (Please select any one) <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> NRE <input type="checkbox"/> NRO <input type="checkbox"/> Others			
MICR Code		IFSC Code	
<input type="text"/>		<input type="text"/>	
Sole/ First Account Holders Name			
<input type="text"/>			
Proof of Bank Account (Please select any one) <input type="checkbox"/> Bank Pass Book <input type="checkbox"/> Canceled Cheque (with the name of client printed on the cheque) <input type="checkbox"/> Original Bank Statement (Self-Attested) <input type="checkbox"/> Copy of Bank Statement (with bank name and sign of bank manager)			

4. New Address
 Permanent Correspondence

<input type="text"/>										Pin code	<input type="text"/>
Proof of Address (Please select any one) <input type="checkbox"/> Passport <input type="checkbox"/> Ration Card <input type="checkbox"/> Driving License (Should be valid at least for next 2 months) <input type="checkbox"/> Voter Id <input type="checkbox"/> Original Bank Statement (Self-Attested) <input type="checkbox"/> Bank Pass Book <input type="checkbox"/> Copy of Bank Statement (with bank name and sign of bank manager) (not more than 2 quarters old) <input type="checkbox"/> Flat Maintenance Bill <input type="checkbox"/> Electricity Bill # <input type="checkbox"/> Telephone Bill # (Mobile Bill not accepted) # (not more than 2 months old)											

5. New Contact Details

Telephone	<input type="text"/>	Mobile	<input type="text"/>
Telephone	<input type="text"/>	Fax	<input type="text"/>
Email Id	<input type="text"/>		

I/We hereby declare that the details furnished above are true and correct to the best of my/ our knowledge and I/ We undertake to inform you any changes therein immediately. In case any of the information is found to be false or untrue or misleading or misrepresentative, I/We am/are aware that I/We may be held liable for it. I/ We agree and understand that all future communication will be sent to me as per the details provided above.

**Name & Sign of First / Sole Holder/
Authorized Signatory**
**Name & Sign of Second Holder
/ Authorized Signatory**
**Name & Sign of Third Holder
/ Authorized Signatory**