

## Account Details Addition/Modification/Deletion Request Form

(Trading & DP A/c)

PLEASE FILL ALL THE DETAILS IN BLOCK LETTERS IN ENGLISH. Please tick mark on the appropriate column

B/O Ref. No. \_\_\_\_\_

Date: \_\_\_\_\_

To, Narnolia Financial Advisors Ltd., 27 MIDC, 101/102, Road NO.17 MIDC, Andheri (E), Mumbai - 400093.  
Marble Arch, 2nd Floor, Office 201, 236B, A. J. C. Bose Road, Kolkata - 700020;

### 1. I/We hereby request you to make the following changes in my/our account details in your records.

1. Change of Address  
  2. Change of Bank  
  3. Updation of Aadhar No.  
  4. Change of Contact Details  
  5. Updation of Family Flag  
  6. Change of Demat Account. (Only Trading A/C)  
  7. Updation of Income Details  
  8. Other Details Changes

NSDL DP ID:    **I N 3 0 2 9 7 8**    Client ID :    \_\_\_\_\_

CDSL DP ID:    **1 2 0 5 3 0 0 0**    Client ID :    \_\_\_\_\_

Client Code :    \_\_\_\_\_

### 1. Below mentioned Address Changes will be updated in Demat/Trading/KRA/&CKYC Records. (CKYC form applicable for individual & should be submitted)

Address Details	Existing Details		New Details	
<input type="checkbox"/> Correspondence Address	<b>Address :</b>		<b>Address :</b>	
	<b>City :</b>	<b>Pin code :</b>	<b>City :</b>	<b>Pin code :</b>
<input type="checkbox"/> Permanent Address	<b>Address :</b>		<b>Address :</b>	
	<b>City :</b>	<b>Pin code :</b>	<b>City :</b>	<b>Pin code :</b>

### 2. Bank Details Addition / Modification / Updation in Demat & Trading A/C :

Bank Details	Existing Details		New Details	
<b>Trading:-</b>	<b>Bank Name :</b>		<b>Bank Name :</b>	
<input type="checkbox"/> Add New as a Primary Bank <small>(This bank will be updated as default bank for PAYOUT)</small>	<b>Bank Address :</b>		<b>Bank Address :</b>	
	<b>A/C No. :</b>		<b>A/C No. :</b>	
<input type="checkbox"/> Add New Bank as a Secondary	<b>A/C Type :</b> <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> O/D		<b>A/C Type :</b> <input type="checkbox"/> Savings <input type="checkbox"/> Current <input type="checkbox"/> O/D	
	<b>MICR :</b>		<b>MICR :</b>	
<input type="checkbox"/> Modify the Bank Details	<small>Note: *9 digit codes of the bank &amp; branch appearing on the cheque issued by the Bank. For availing ECS facility, MICR code is mandatory.</small>			
	<b>IFSC Code :</b>		<b>IFSC Code :</b>	
<b>Demat:-</b>				
<input type="checkbox"/> Modify the Existing bank details				

\*Attached Preprinted cancel cheque, if not printed then latest bank statement/passbook (not more than 3 months old) is required.

### 3. Updation of Aadhaar No. (for Demat & Trading both)\*\*:

<b>Aadhaar No.</b>			
<b>Holder (s)</b>	1 <sup>st</sup> Holder Name	2 <sup>nd</sup> Holder Name	3 <sup>rd</sup> Holder Name

\*\* Submitted self attested copy of Aadhaar card

### 4. Below mentioned Changes in Contact Details will be updated in Demat & Trading A/C

Contact Details	Existing Details		New Details	
<b>Trading :</b>	<b>Tel No. :</b>		<b>Tel No. :</b>	
<input type="checkbox"/> Change of Contact Details	<b>Mobile No. :</b>		<b>Mobile No. :</b>	
<input type="checkbox"/> Addition of Contact Details	<b>Email ID :</b>		<b>Email ID :</b>	
<b>Demat :</b>				
<input type="checkbox"/> Change of Contact Details				

**5. Family Flag Updation in Demat & Trading A/C:**

Mobile No. \_\_\_\_\_ and  Email ID \_\_\_\_\_  
 Option to receive e- Statement Flag Enable

I/We regularly receive contract notes & other details of my /our transactions at aforesaid e-mail id/mobile number and are fully aware about all my/our transactions. I/We hereby request you to please send the contract notes and other details of transactions relating to my/our above mentioned account with you at aforesaid e-mail id/Mobile number.

	First/Sole Holder		(In case of Joint Demat Account)			
			Second Holder		Third Holder	
Please Tick any One for Each Holder	<input type="checkbox"/> Me	<input type="checkbox"/> My Family Member #	<input type="checkbox"/> Me	<input type="checkbox"/> My Family Member #	<input type="checkbox"/> Me	<input type="checkbox"/> My Family Member #
Holder (s) Name						

#- Spouse, Dependent Children and Dependent Parents

- (i) Client must ensure the confidentiality of Password of the email account. (ii) Client must promptly inform the participant if the email address has changed.  
 (iii) Client may opt to terminate this facility by giving 10 days prior notice. Similarly participant may terminate this facility by giving 10 days prior notice.

**6. Change of Demat Account (Applicable for Trading A/c Only).**

<input type="checkbox"/> Primary	DP Name :																			
	DP ID :											Client ID :								
<input type="checkbox"/> Secondary	DP Name :																			
	DP ID :											Client ID :								

\*Attached DP client master list with original DP stamp

**7. Please update my/our annual Income details\*:**

Annual Income	<input type="checkbox"/> Upto 1 Lac	<input type="checkbox"/> 1-5 Lacs	<input type="checkbox"/> 5-10 Lacs	<input type="checkbox"/> 10-25 Lacs	**Net Worth Rs _____ As On Date _____ (Networth Should not be older than 1 year )
	<input type="checkbox"/> 25-50 Lacs	<input type="checkbox"/> 50 Lacs - 1 Crore	<input type="checkbox"/> Above 1 Crores		

\*Documents should be attached (IT Return Ack./Bank Statement/Balance Sheet/Net worth Certificate)

\*\* Mandatory incase of non-individual

**8. Others Details Update/Modify :(Please Specify)**

Particulars	Details Updates/Modify

Holder(s)	Name	Signature(s)
Sole/1 <sup>st</sup> Holder		
2 <sup>nd</sup> Holder		
3 <sup>rd</sup> Holder		

**For office use only:**

Signature Verified	Maker	Checker

DP Stamp & Date

Instruction No. \_\_\_\_\_ Date of Instruction \_\_\_\_\_