

Documents And Information for Mutual Fund Account Opening & Client Onboarding

1. PAN Card
2. Aadhar Card
3. Passport size photo
4. Mobile number
5. Email ID
6. Occupation
7. Birth Palace
8. Mother name & DOB

Bank details

1. Cheque or passbook
2. SIP Date
3. Signature

Nominee details

1. Nominee name and Relation with Investor
2. Nominee ID Pan or Aadhar
- 3 Mobile number
- 4.Email ID