



PMS ACCOUNT OPENING REQUIREMENTS - INDIVIDUAL

✦ Mobile Number: _____

✦ Email ID: _____

✦ Client's Occupation: _____

✦ Occupation Address: _____

✦ Name of the organization where the client works: _____

✦ Education: _____

✦ Marital Status: _____

✦ Field/Area of Occupation: _____

✦ Client's Mother Name: _____

✦ Income Range (Tick Here):
(A) 0–10 lakh (b) 10–25 lakh (c) 25–50 lakh (d) 50–1 crore
(e) 1–10 crore (f) 10–50 crore (g) >50 crore

✦ Net Worth (Latest): _____

Nominee Detail:

✦ Name: _____

✦ Mobile Number: _____

✦ Email ID: _____

✦ Relationship: _____

Required Documents for Individual:

Particulars	No.Of Sets	Instructions
PAN Card -All The Holders	2	Self Attested
Aadhar Card-All The Holders (E- Masked)	2	Self Attested
PAN Card- Nominee	2	Self Attested
Aadhar Card- Nominee (E- Masked)	2	Self Attested
Cancel Cheque Of The Holder (Original)	1	*
3 Photos Of All The Holders	2	*
Latest 6 Month Bank Statement Or Last Two Year ITR	2	Self Attested

- 2 Witness Names Required from Client Side
- All xerox documents should be self-signed as per PAN card.