

PMS Closure Form

Date: _____

To,
CKREDENCE WEALTH MANAGEMENT PVT. LTD.
B-106, Tirupati Plaza,
Near Collector office,
Athwagate, Surat-395001

Request for Closure of PMS Account

I/We the undersigned, hold PMS Account No. _____ with your Company.
I/We hereby request you to close the said PMS Account by way of:

Redemption of all my/our securities and proceeds to be credited to my/our Bank Account registered at the time of Application. My account details are as under:

Account Holder's Details	
PMS A/c Number/Folio Number	
Name	
Address	
City	
State	
PIN	
Amount (In Rs.)	
Amount (in words)	

OR

Transfer all the securities to Demat Account owned by me/us to:

Name	
DP ID	
BO ID	

I/ We hereby confirmed /declared that we have verify all past transactions in my/our below code and all transactions in my/ our accounts are authenticate, true and done as per PMS Agreement between us.

Reason for Closing: _____

	1st Holder	2nd Holder	3rd Holder
Name			
Signature			

Date:

To,
Ckredence Wealth Management Pvt Ltd.
B-101, Tirupati Plaza, B/H Collector Office
Athwagate, Surat-395001

Sub: Request for Redemption of funds

I/We want to redeem investments to the extent mentioned herein after, including accretions. Kindly remit me/us the proceeds by crediting to the Bank account registered at the time of Application / execution of the agreement.

Client Details:-

OFIN NO	PMS A/C NUMBER	CLIENT ID	NAME

Redemption Details:

Investment Approach	Amount
	INR _____ (Rupees in Figures) _____ (Rupees in words)

Bank Details:

Bank Name	Account Number	IFSC code

Please note, if the bank details are different from the client's registered bank account details, kindly Provide the cancelled cheque copy (or bank statement not older than 3 months) of the new account.

Signature

Signature

Signature

1st Applicant Name

2nd Applicant Name

3rd Applicant Name

PAN: _____

PAN: _____

PAN: _____

Note: Pursuant to the provisions of SEBI (Portfolio Managers) Regulations, 2020, in case of partial redemption, minimum amount of Rs. 50,00,000 (Rupees Fifty Lacs) shall be maintained in the PMS Account.