

A step-by-step guide to Open Trading & Demat account offline

Opening a Demat & Trading account offline is a simple process that requires certain eligibility documents. Similar to opening a bank account, the documents required for a Demat & Trading account include proof of identity, address, income, bank account, PAN card, and photographs.

Here is a step-by-step guide to opening a Demat & Trading account offline:

- **Gather Required Documents:** Ensure you have the necessary documents for opening a Demat & Trading account, including proof of identity (such as PAN card), proof of address (recent utility bills), proof of income (if applicable), proof of bank account, PAN card, and photographs.
- **Account Opening Form:** Obtain the account opening form from the chosen Branch by physically visiting the branch of **Wallfort Financial Services Ltd.(WFSL)**
- **Filling the Form:** Carefully filling the account opening form with accurate information. Double-check all the details before submitting the form.
- **Attach Required Documents:** Attach all the necessary documents as mentioned in the form, including proof of identity, address, income, bank account details, PAN card, and photographs. Make sure to provide photocopies as per the DP's requirements.
- **Visit the Office:** Visit the office in person and submit the filled-out form along with the required documents. Hand over the photocopies for verification and keep the original documents with you for verification purposes
- **Personal Verification:** The Broker will conduct a personal verification process to confirm your identity and other details. This may involve a face-to-face meeting or video verification.
- **Application Processing:** Once the personal verification is completed, the WFSL will process your application for opening a Demat & Trading account.
- **Demat Account Number/ Trading UCC:** After the application is processed successfully, you will receive a unique Demat account number & Trading UCC from the WFSL. This will serve as your identification for future transactions.
- **Start Trading:** With your Demat account successfully opened, you can now link it with a trading account and start trading/ investing in the and other capital market-related instruments. Don't forget to include funds in your trading account before trading/ investing.