



*InCred Capital Wealth Portfolio Managers Private Limited*

# ONLINE ACCOUNT PROCESS

*Retail Clients (Resident Individual)*

## 01 - STEP

Client logs in to the Incred Equities Account opening page.

<https://incred-account-open.incredcapital.com/incred/signup>

## 02 - STEP

At this stage client would enter basic customer information and validate the information through an OTP which is sent on email and mobile provided by the client. By this OTP verification customer agrees and gives its consent to Incred Equities to connect with him in future

**InCred Equities**

Open Paperless  
**TRADING & DEMAT ACCOUNT**

ALL YOU NEED IS:

- Aadhaar Number & same should be linked with PAN
- Scanned PAN Image
- Scanned Signature
- Income Proof
- Cancelled personalized Cheque
- Use Laptop or desktop with Webcam

**eKYC Online Registration**

Mobile No  
Enter your mobile number

Select Dependency  
Self

**Send OTP**

**InCred Equities**

**Email Now**

Sign in with Google

Or

Email ID \*  
raj.star717@gmail.com

Select Dependency  
Self

Please accept the [Terms & Conditions](#)

**REGISTER**

03 STEP

Client is required to input his PAN and Date of Birth.

The screenshot shows the InCred! Equities registration interface. A modal window is displayed in the foreground with a green checkmark icon and the text "Name As Per PAN RAJEEV VASHIST". Below the text are two buttons: "PROCEED" (orange) and "CANCEL" (red). In the background, the registration form is visible, showing a field for "PAN (Permanent Account Number)" with the value "AFPPV1405A". To the left, there is a section titled "We'll begin with your PAN First" and a list of instructions: "Provide Your PAN mentioned on your PAN card", "Your Account Name mentioned in the PAN card should match", and "PAN card should be valid".

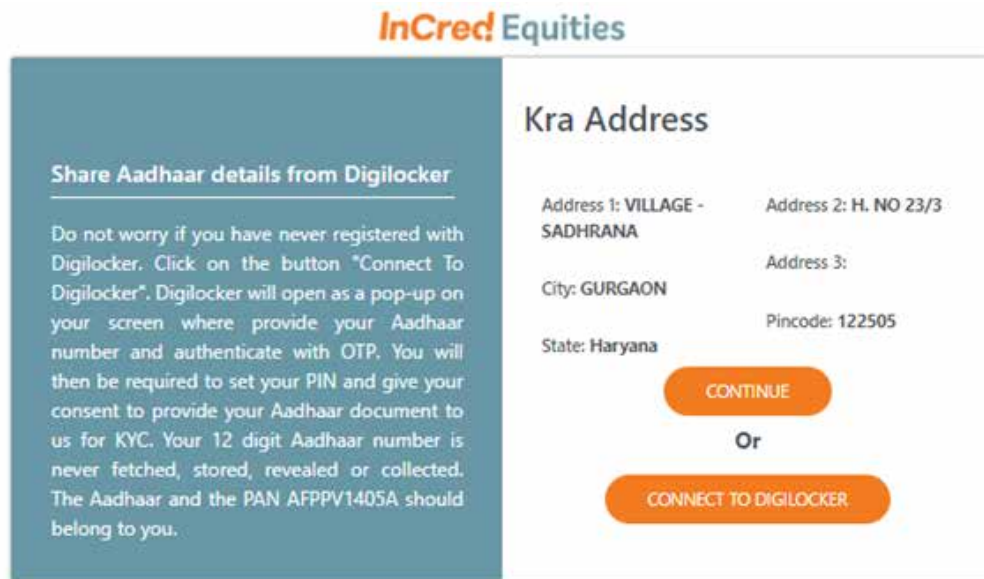
04 STEP

Client is required to select Trading & Demat account / segments / check equity brokerage plan.

The screenshot shows the InCred! Equities registration interface for account selection. The "Select Account Type" dropdown is set to "Trading and Demat". Below this, there are two columns for "NSE" and "BSE" segments. Under "NSE", "CASH" is selected with a blue checkmark, while "CURRENCY" and "EQ\_DERIVATIVE" are not. Under "BSE", "CASH" is selected with a blue checkmark, while "EQ\_DERIVATIVE" is not. Below the segment selection, "CDSL\_DP" is selected with a blue checkmark. At the bottom, there is a section for "Equity Brokage Plan" with a "View Plan" button, and a "Running Settlement Marking Option" set to "Quarterly". A "NEXT" button is located at the bottom right.

05 STEP

System will validate basis the information available if the client is KRA/CKYC verified. If the client is KRA/CKYC verified, then information from KRA/CKYC is auto populated else customer can use Digi locker.



**InCred! Equities**

**Kra Address**

Address 1: VILLAGE - SADHRANA      Address 2: H. NO 23/3

City: GURGAON      Address 3:

State: Haryana      Pincode: 122505

CONTINUE

Or

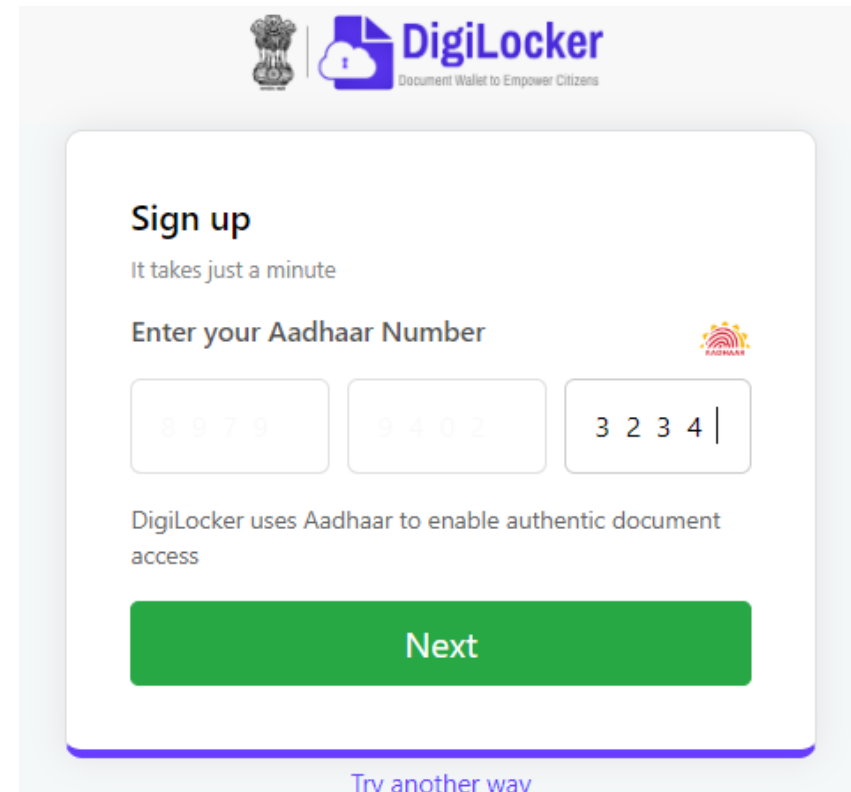
CONNECT TO DIGILOCKER

**Share Aadhaar details from Digilocker**

Do not worry if you have never registered with Digilocker. Click on the button "Connect To Digilocker". Digilocker will open as a pop-up on your screen where provide your Aadhaar number and authenticate with OTP. You will then be required to set your PIN and give your consent to provide your Aadhaar document to us for KYC. Your 12 digit Aadhaar number is never fetched, stored, revealed or collected. The Aadhaar and the PAN AFPPV1405A should belong to you.

06 STEP

If client is not KRA verified, client is required to click on "Connect to Digilocker" for address proof. Client is required to put his UID number and click on "Next".



**DigiLocker**  
Document Wallet to Empower Citizens

**Sign up**  
It takes just a minute

Enter your Aadhaar Number

8 9 7 9      9 4 0 2      3 2 3 4 |

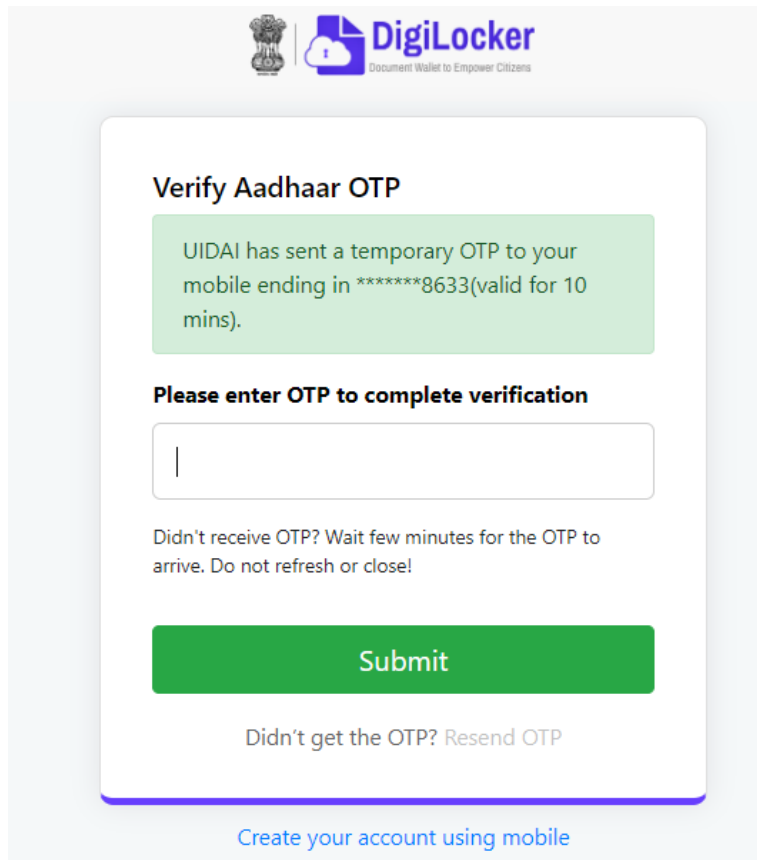
DigiLocker uses Aadhaar to enable authentic document access

Next

[Try another way](#)

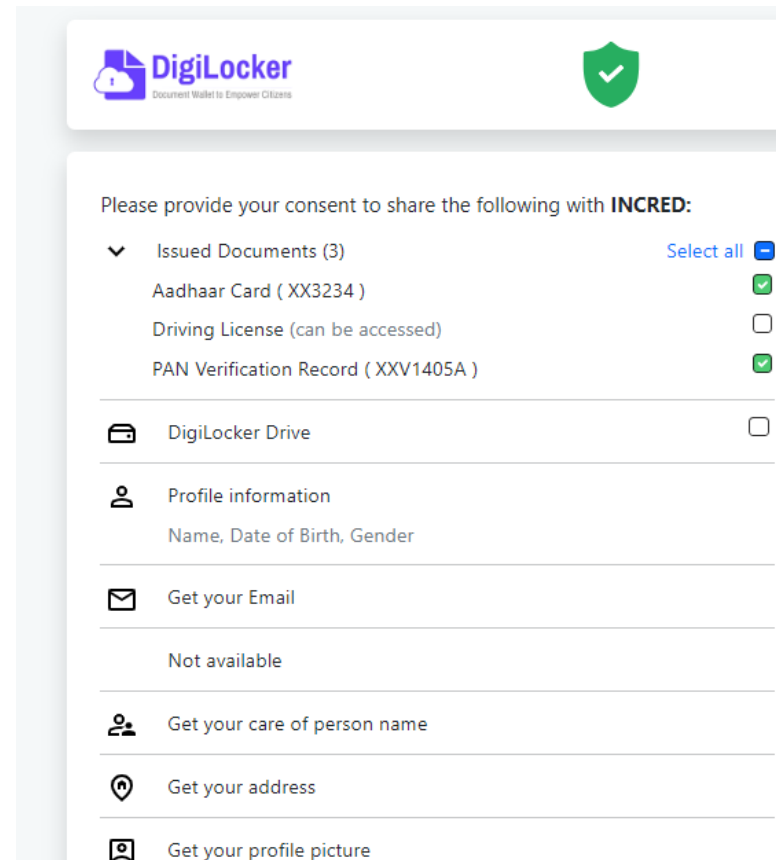
07 STEP

Client is required to put OTP received on his mobile device and click on "Submit".



08 STEP

Digilocker will ask whether client is really to share the information with InCred or not. Client is required to click on "ALLOW".



## 09 - STEP

Client photo image of UID & Address will auto populate

### Please Verify Your Details

Rajeev Vashist

Father's Name :  
D.O.B : 03-10-1982  
Gender : Male  
Address : House No-23/3 Sadhrana , Sadhrana(45),  
Gurgaon, Haryana, India, 122505

CONTINUE

## 10 STEP

Client photo image of UID & Address will auto populate

**InCred Equities**

**My sole country of tax residency India**

- I have understood the information requirements of this form (read along with FATCA & CRS instructions) and hereby confirm that the information provided by me/us in the form is true, correct and complete. I also confirm that I have read and understood the FATCA & CRS and conditions below and hereby accept the same. Name for your account will be updated as per the income tax declaration due to Exchange regulations.
- I agree to open a trading and demat account.
- I confirm to have read and understood the contents of FATCA / CRS declaration.

Father's Name:  Mother's Name:

Marital Status:  Spouse Name:

Education:  Annual Income(latest):

Trading Experience:  Politically Exposed:

Occupation:  Net Income:

Net Income Date:

Do you want to add nominee?  Yes  No

Do you wish to execute DOR? (What is DOR?)  Yes  No

**VERIFY**

**InCred Equities**

**First Nominee**

Name:  Email:  Mobile:  DOB:

Same as Holder Address

Relation:  Address1:  Address2:  City:

State:  Pincode:  Country:  Nominee1 Percentage:

Select any ID PROOF:  PAN:  Identity Proof (only png, jpg) (file should be less than 4MB)  No file Selected

Add Second Nominee  Add

**SUBMIT**

**InCred Equities**

**First Nominee**

Name:  Email:  Mobile:  DOB:

Same as Holder Address

Relation:  Address1:  Address2:  City:

State:  Pincode:  Country:  Nominee1 Percentage:

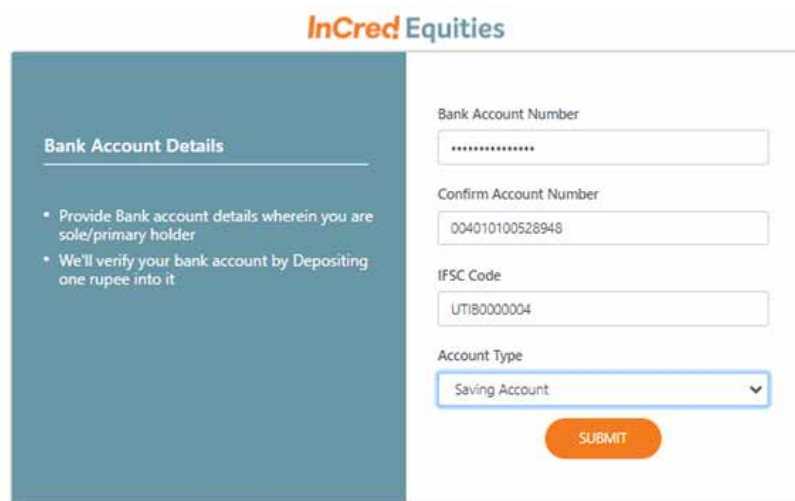
Select any ID PROOF:  PAN:  Identity Proof (only png, jpg) (file should be less than 4MB)  No file Selected

Add Second Nominee  Add

**SUBMIT**

## 10 - STEP

Client's Bank Account Details are verified using Penny Drop Facility. If penny drop facility fails to identify the clients bank account details, then client has to upload the Bank proof.



**InCred Equities**

### Bank Account Details

- Provide Bank account details wherein you are sole/primary holder
- We'll verify your bank account by Depositing one rupee into it.

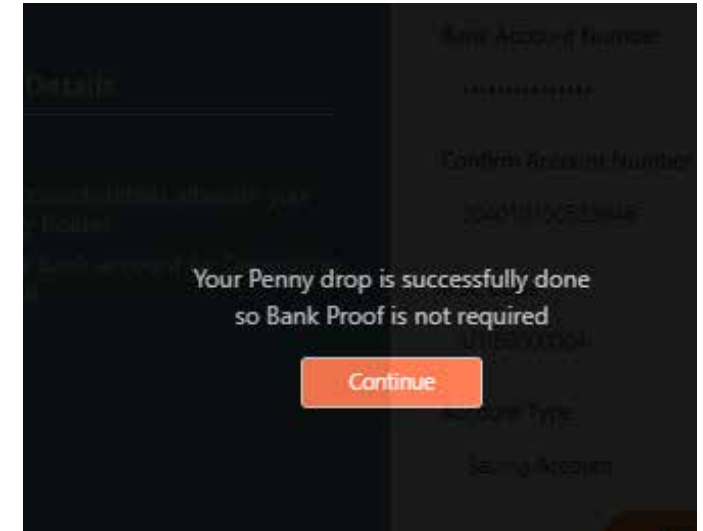
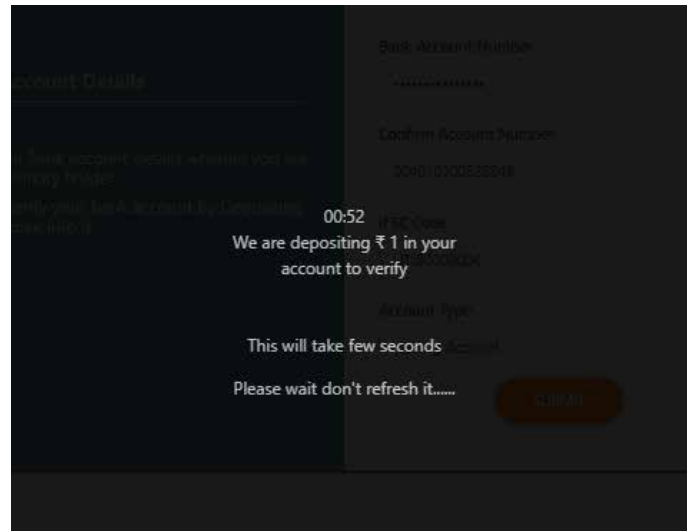
Bank Account Number:

Confirm Account Number:

IFSC Code:

Account Type:

**SUBMIT**






11 STEP

Client is required to to upload the image of his/her signature.



Upload Signature

Please sign on screen, this will be captured as your authorized signature



Upload Your Signature  
File must be in JPEG or PNG format (max size 5MB)

Upload

NEXT

12 STEP

Client is required to take a live selfie.

**InCred! Equities**



**Webcam Client Image - Final Step**



Note: Please enable your camera and location from browser setting.


**Important Image Instructions**

- » Do not wear goggles, cap or anything covering the face
- » Capture clear image with a sufficient light
- » Not other person should appear in the image
- » Distance between the camera should not be more than 1.5 meter
- » Background of the image should be plain, preferably white
- » Do not use the rotated image. Capture only an upright image.

Specimen Image

CAPTURE

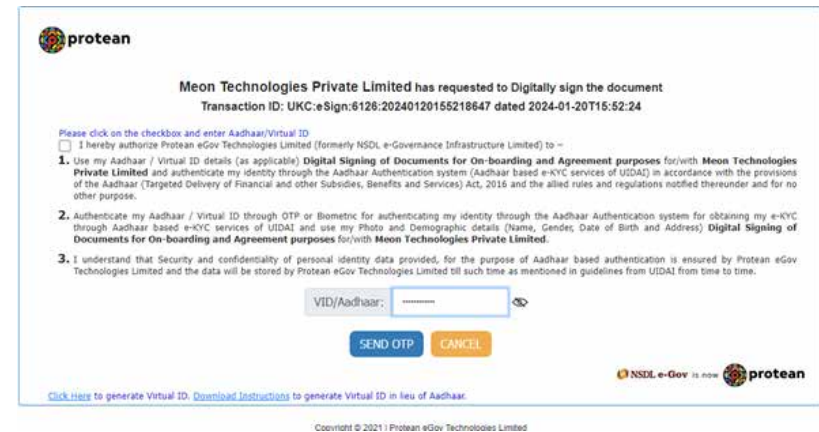
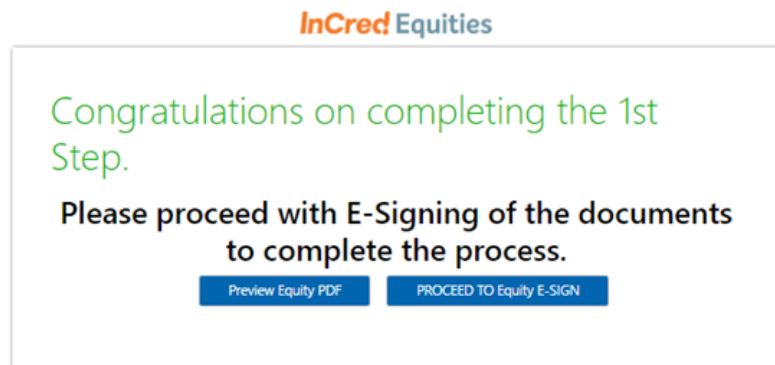
SUBMIT & CONTINUE

13 STEP

Customer can preview account opening pdf copy containing his/her details.

14 STEP

Client needs to sign the documents using Aadhar Esign and submit the applications.



✓ Signed Successfully !

Thank you! Your E-sign has been Completed.

You may close the window.

Customer is made aware that activation may take up to 2 days.  
Once the account is opened, he receives his login credentials through the registered email id and mobile number.

# ACCOUNT OPENING PROCESS

## OFFLINE ACCOUNT

Visit our nearest branch office. <https://www.incredequities.com/contact-us/>

Mumbai – Unit No. 3, 5th Floor, Laxmi Towers – B, G Block, BKC, Bandra (E), Mumbai – 400051

### Documents required for offline account.

1. Carry a Pan Card,
2. Mask Aadhar Card or Voter Id or Passport or Driving License,
3. 2 Photograph,
4. Bank Proof i.e., Cheque or Bank Statement

In case if client is unable to complete the client onboarding journey through online mode, please visit to our nearest branch. Our service team / relationship manager will assist you in completing the onboarding journey. They would verify the documents and help to open the account.

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## Let's Talk

 022 41611521 / 022 41611519  [customer.service@incredcapital.com](mailto:customer.service@incredcapital.com)

**THANK YOU**

**OFFLINE - Trading & Demat Account Opening Process with Incred Capital Wealth Portfolio Managers Private Limited.**

