InCred Equities

Requisition form for Addition / Deletion / Modification of Account Details in Equity/Commodity

☐ Trading ☐ Depository

Date: ____/____/_____
(To be filled by Holder)

To,
InCred Capital Wealth Portfolio Managers Pvt Ltd
Unit No. 1502A, 15Th Floor, B Wing,
The Capital, Plot No. C – 70, G Block,
BKC, Bandra East, Mumbai - 400051

*Mandatory Fields

I/We request you to make the following Additions / Deletion / Modifications to my/our account in your records. Account details are as under

* **Depository Account Number:** ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ * **Trading Code :** ☐☐☐☐☐☐☐☐☐☐

* Please tick Request & Category

* Strike off blank fields

	Request For	Category	Existing Details	New Details
1	☐ Modification	☐ Address Details ☐ Correspondance ☐ Permanant ☐ Email ID ☐ Mobile / Landline Number ☐ Bank Details ☐ Signature ☐ Name Change		

Note: In case of Addition, please enter 'Nil' in "Existing Details'

	Request For	Category	Existing Details	New Details
2	☐ Addition ☐ Modification	☐ Bank Details ☐ Add with Default ☐ Add without Default ☐ Other DP Details ☐ ____________ pls specify ☐ ____________ pls specify		

I/We wish to update the below details* (Select any 1)

ANNUAL INCOME ***(Should not be older than 1 year)***	Less than 1 Lakh ☐	5 to 10 Lakhs ☐	25 Lakhs to 1 Cr ☐
	1 to 5 Lakhs ☐	10 to 25 Lakhs ☐	1 Cr to 5 Cr ☐
	Networth : ____________ **as on** ____________ **(Date)**		Greater than 5 Cr Please specify ________

Income range to be updated on Annual basis

Family Declaration:
Please Fill up below declaration in case Email/ Mobile is already updated in sole / first holder account and wish to update same details for Family member as per SEBI guidelines.
I and my family members hereby request that mobile number being ____________________and Email ID being ______________________, belonging to sole / first account holder shall be considered in your records for the purpose of receiving communication from you or Stock Exchanges or Depository with regard to details of trading / DP transactions executed through you.
Thus, any communication relating to our trading and demat account should be sent to the above mentioned mobile number and e-mail ID. This facility shall be extended to us as an exception, for our convenience of receiving transaction details at a single mobile number and e-mail ID.
I understand that for the purpose of availing the above facility **"family" means self, spouse, dependent children and dependent parents.**

Sr. No.	Client Name	Client Code	Relationship with first holder	Signature
1				
2				
3				
4				

Use separate sheet for more family members (if any).

Declaration : I/We hereby declare that the details furnished above are true and correct to the best of my/our knowledge and belief. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am/we are aware theat I/we may be held liable for it.

Client Name	Sole / First Holder	Second Holder	Third Holder
Client Signature			

Acknowledgement

Received Addition / Deletion / Modificationrequest for : ☐ Address Details ☐ Email ID ☐ Mobile / Landline Number ☐ Bank Details ☐ Signature ☐ Other DP Details

Depository Account Number: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ **Trading Code :** ☐☐☐☐☐☐☐☐☐☐

Receipt Date and Stamp