



Procedure for Opening Trading / Demat Account (Offline Process Only)
(Email ID : backoffice@indsec.co.in / dp@indsec.co.in)

Step 1: Download Client Registration Documents (Account Opening Kit)

Kindly visit link <http://www.indsec.co.in/client-registration-document> and download Following Forms / Documents:

Category	Trading Account	Demat Account
Individual	Broking - Account Opening Kit - Individual	DP - Account Opening Kit - Individual
Non Individual	Broking - Account Opening Kit - Non Individual	DP - Account Opening Kit - Non Individual

Step 2: Validation of KYC with KRA and CKYC

In case your basic KYC details are registered with KRA as well as CKYC Authority (CERSAI), then kindly share your Permanent Account Number (PAN) and Date of Birth / Date of Incorporation with us, on the basis of which, KYC documents will be downloaded and shared with you for confirmation.

Step 3: Fill and Submit the Account Opening Form along with all the Documents

Fill up the Demat / Trading Account Opening Form. You will have to provide all your details, such as your full name, address, phone number, email, bank account details, demat account details, income range, etc. (as applicable). Fill in the correct details and submit the form along with necessary supporting documents as mentioned in the Form.

Note: In case KYC shared as per Step 2 is having latest and accurate information, there is no need to fill KYC Form (Part I) pages and submit KYC related supporting documents. However, in case of any update, kindly fill KYC Form (Part I) pages with "Update" tick at appropriate field.

Step 4: In-Person Verification

Once the documents are submitted, then the next step is In-Person Verification (or IPV), wherein you will have to appear in person at our office or our executive will visit your place. This is a vital exercise that you must complete to verify and validate your details.

Step 5: Processing of Account Opening Request

Once above processes are complete, our Backoffice Team / DP Team will start, verify and expedite your account opening application. You will be provided Account Opening Welcome letter for Trading Account / Client Master Report (CMR) for demat account post your application has been verified and approved.

Congratulations!!! You are now ready to transact in securities in Secondary Market through us / use your demat account.

