

Know Your Customer (KYC) Application Form | Individual

Important Instructions:

- A) Fields marked with "*" are mandatory fields.
- B) Please fill the form in English and in BLOCK letters.
- C) Please fill the date in DD-MM-YYYY format.
- D) Please read section wise detailed guidelines / instructions at the end.
- E) List of State / U.T code as per Indian Motor Vehicle Act, 1988 is available at the end.
- F) List of two character ISO 3166 country codes is available at the end.
- G) KYC number of applicant is mandatory for update application.
- H) For particular section update, please tick (✓) in the box available before the section number and strike off the sections not required to be updated.

1. PERSONAL DETAILS (Please refer instruction A at the end)

	Prefix	First Name	Middle Name	Last Name
<input type="checkbox"/> Name* (Same as ID proof)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maiden Name (If any*)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father / Spouse Name*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mother Name*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender*	<input type="checkbox"/> M- Male	<input type="checkbox"/> F- Female	<input type="checkbox"/> T-Transgender	
Marital Status*	<input type="checkbox"/> Married	<input type="checkbox"/> Unmarried	<input type="checkbox"/> Others	
Citizenship*	<input type="checkbox"/> IN- Indian	<input type="checkbox"/> Others (ISO 3166 Country Code <input type="text"/>)		
Residential Status*	<input type="checkbox"/> Resident Individual	<input type="checkbox"/> Non Resident Indian		
	<input type="checkbox"/> Foreign National	<input type="checkbox"/> Person of Indian Origin		
Occupation Type*	<input type="checkbox"/> S-Service (<input type="checkbox"/> Private Sector	<input type="checkbox"/> Public Sector	<input type="checkbox"/> Government Sector)	
	<input type="checkbox"/> O-Others (<input type="checkbox"/> Professional	<input type="checkbox"/> Self Employed	<input type="checkbox"/> Retired	<input type="checkbox"/> Housewife <input type="checkbox"/> Student)
	<input type="checkbox"/> B-Business			
	<input type="checkbox"/> X- Not Categorised			

PHOTO

Signature / Thumb Impression

2. TICK IF APPLICABLE RESIDENCE FOR TAX PURPOSES IN JURISDICTION(S) OUTSIDE INDIA (Please refer instruction B at the end)

ADDITIONAL DETAILS REQUIRED* (Mandatory only if section 2 is ticked)

ISO 3166 Country Code of Jurisdiction of Residence*	<input type="text"/>
Tax Identification Number or equivalent (If issued by jurisdiction)*	<input type="text"/>
Place / City of Birth*	<input type="text"/>
ISO 3166 Country Code of Birth*	<input type="text"/>

3. PROOF OF IDENTITY (PoI)* (Please refer instruction C at the end)

(Certified copy of any one of the following Proof of Identity [PoI] needs to be submitted)

<input type="checkbox"/> A- Passport Number	<input type="text"/>	Passport Expiry Date	<input type="text"/>
<input type="checkbox"/> B- Voter ID Card	<input type="text"/>		
<input type="checkbox"/> C- PAN Card	<input type="text"/>		
<input type="checkbox"/> D- Driving Licence	<input type="text"/>	Driving Licence Expiry Date	<input type="text"/>
<input type="checkbox"/> E- UID (Aadhaar)	<input type="text"/>		
<input type="checkbox"/> F- NREGA Job Card	<input type="text"/>		
<input type="checkbox"/> Z- Others (any document notified by the central government)	<input type="text"/>	Identification Number	<input type="text"/>
<input type="checkbox"/> S- Simplified Measures Account - Document Type code	<input type="text"/>	Identification Number	<input type="text"/>

4. PROOF OF ADDRESS (PoA)*

4.1 CURRENT / PERMANENT / OVERSEAS ADDRESS DETAILS (Please see instruction D at the end)

(Certified copy of any one of the following Proof of Address [PoA] needs to be submitted)

Address Type*	<input type="checkbox"/> Residential / Business	<input type="checkbox"/> Residential	<input type="checkbox"/> Business	<input type="checkbox"/> Registered Office	<input type="checkbox"/> Unspecified
Proof of Address*	<input type="checkbox"/> Passport	<input type="checkbox"/> Driving Licence	<input type="checkbox"/> UID (Aadhaar)		
	<input type="checkbox"/> Voter Identity Card	<input type="checkbox"/> NREGA Job Card	<input type="checkbox"/> Others	<input type="text"/>	
	<input type="checkbox"/> Simplified Measures Account - Document Type code	<input type="text"/>			

Address

Line 1*	<input type="text"/>				
Line 2	<input type="text"/>				
Line 3	<input type="text"/>				
District*	<input type="text"/>	Pin / Post Code*	<input type="text"/>	State / U.T Code*	<input type="text"/>
				ISO 3166 Country Code*	<input type="text"/>

Policy & Disclaimer

Credentials-

By registering your mobile number & email id on WealthChaser Global Research's website - you agree to be contacted by our personnel or to receive SMS's 7 mails and it shall be treated as opt inn in case if the contact number you have registered with us is subscribed in DND registry (Do Not Disturb). By registering for our services you also agree to comply with our Private Policy and Terms & Conditions.

Please be aware that you may receive calls related to services promotions and any sort of contests and polls organized by us. In case there are any changes in your contact information that we retain, please bring this to our knowledge either by call or email.

Your information whether public or private will not be sold, rented, exchanged, transferred or given to any company or individual for any reason without your consent for the same.

The only use we will be bringing to your information will be for providing the services to you for which you have subscribed to us for which you gave us your information.

Your information given to us represents your identity with us. If any changes are brought in any of the fields of which you have provided us the information, you shall bring it to our notice by either calling us or dropping a mail to us.

In addition to the service provided to you your information (Mobile Number, E-Mail ID etc.) can be brought in use for sending you newsletters, survey, contest information, or information about any new services of the Company which will be for your own good and while subscribing for our services you agree that WealthChaser has the right to do so.

By subscribing to our services you consent to our Privacy Policy and Terms of Use.

WealthChaser may change its Privacy Policy from time to time, and in WealthChaser sole discretion. WealthChaser encourages visitors to frequently check this page for any changes to its Privacy Policy. Your continued use of this site after any change in this Privacy Policy will constitute your acceptance of such change.

Before making a decision for subscribing with us go through our website thoroughly. Your credit cards and passwords are not disclosed to anyone, and your membership is secured.

Make sure you have gone through the disclaimer, privacy policy, terms and conditions and refund policy before proceeding for subscription or making payment for any of our services.

Disclaimer-

The information and views in this website & all the services we provide are believed to be reliable, but we do not accept any responsibility (or liability) for errors of fact or opinion. Users have the right to choose the product/s that suits them the most.

The information given herein should be treated as only factor, while making investment decision. The report does not provide individually tailor-made investment advice.

For- WealthChaser Global Research

Customer Name-
Customer Signature-
PAN NO.-
Date-

Note- Make sure your Sing will match with sign on your documents.

For WealthChaser Global Research
Indore- 452001

WealthChaser Global Research Investment Advisers recommends that investors should independently evaluate particular investments and strategies, and encourages investors to seek advice of a financial adviser. WealthChaser Global Research Investment Advisers shall not be responsible for any transaction conducted based on the information given in this report, which is in violation of rules and regulations of NSE and BSE.

Investment in equity shares, futures, options and commodities has its own risks. Sincere efforts have been made to present the right investment perspective. The information contained herein is based on analysis and on sources that we consider reliable. We, however, do not vouch for the accuracy or the completeness thereof. This material is for personal information and we are not responsible for any loss incurred due to it & take no responsibility whatsoever for any financial profits or loss which may arise from the recommendations above. The information contained herein is from sources believed reliable. We do not represent that it is accurate, complete and it should not be relied upon as such. Any action taken by you on the basis of the information contained in this site is your responsibility only and we will not be liable in any manner for the consequences of such action taken by you.

Price and availability of products and services offered on the site are subject to change without prior notice. We provide information about the availability of products or services to a certain extent but you should not rely on such information. WealthChaser will not be liable for any lack of availability of products and services you may order through the site.

Medium of Services delivery shall be SMS only, voice support will not be considered as a services delivery medium. Any other mode of recommendation such as voice, company will not be responsible for.

Service taker in force to follow mandatory given stop loss order mentioned in provided Recommendations in case of avoiding stop loss Order Company will not be responsible of the same.

You have to keep maintain minimum investment required as per product specification.

According to company policy one should have to mandatory complete risk profiling and product selection through immediate representative of service provider and choose your product accordingly.

For- WealthChaser Global Research

Customer Name-
Customer Signature-
PAN NO.-
Date-

Note- Make sure your Sign will match with sign on your documents.

Date: -----

Dear Mr: - -----

Address: -----

PAN: -----

It is our sincere pleasure to welcome you in WealthChaser Global Research and we hope that you will find great value in the relationship that the combined teams of WealthChaser will provide. WealthChaser Global Research is a SEBI registered firm under the Securities and Exchange Board of India (Investment Advisers) Regulations, 2013.

It's our duty to inform following points:

Clause No.	Clause
1.	Relationship: We have fiduciary relationship with each other and it's based on trust and good faith.
2.	Term and Condition: We hope that you read and understand the term and condition, refund policy, disclaimer, disclosures and any other related documents from our website. If you want some clarification on those, then contact us.
3.	Risk: In Market both Unsystematic risk and Systematic risk are present, Unsystematic risk can be reduced through diversification in investment. Systematic risk, also known as "market risk" or "un-diversifiable risk", is the uncertainty inherent to the entire market or entire market segment
4.	Risk Profile Process: You have completed the risk profile and now you understand about the risk profile because our advice is based on your risk profile also. We have only high risk products. If any change in your risk profiling, then it's your responsibility to inform us.
5.	Past Performance is not an indication of future success.
6.	No Speculation: The name of firm is not speculator firm, here we provide our best research to you for return.
7.	Execution of Advice: In fee based advisory mode, the burden of execution of advice is on yours, after that we are not responsible for any type execution.
8.	Fee: We accept only fee from proper banking channel after the KYC (Know your Customer) process completed.
9.	Accountability: We are accountable only our advice, if you receive any other SMS, Stock Trip and similar type of message, mail or call then we are not responsible for that.
10.	Third Party Relation: The WealthChaser is not relation with any Stock Broker, Sub Brokers, etc.
11.	Advice Only: WealthChaser works on fee base model and only provides the advisory services; we haven't any execution department and arm.
12.	Compliant: In near future, if you any have problem and/or complaint against the WealthChaser then first you inform us, we provide best solution and trying to solve your problem as soon as possible.

Note: As per your age and risk profile assessment report, you are not liable to invest more amounts in the stock market. You have read all the documents which are related to investments and you are liable all the responsibilities.

If you have any questions or concerns throughout the course this transaction, please don't hesitate to contact us at +91-731-6657924 or at compliance@wealthchaser.com

Best Regards,

WealthChaser Global Research

Client Signature -----

Client Declaration

This is our standard client agreement upon which we intend to rely, for your own benefit and protection you should read the term of this agreement, disclosures, disclaimer and term and conditions carefully before signing. As by signing you consent to the terms contained.

I/We agree and confirm that the details are in this letter is correct. I/We confirm that I/we have read and understood our agreed the clause 1 to 12 without any coercion. I/We fully aware about the risk involve in the investments and market. Investment Adviser is not responsible for that.

I/we understand and consent to the above terms and I hereby authorize WealthChaser Global Research to my investment adviser. The Liabilities and responsibilities of WealthChaser Global Research will be limited to its service provided. I/we read and understand all the above said documents. I/we agree that the client agreement will come into effect from the date of issue.

- I know and agree on the Risk profile, Risk Score and Risk Assessment report.
- I know and agree the risk involved in the market.
- I know and agree on that the risk nature of services.
- I am the sole responsible for my all investment decisions.
- I know and agree to comply of SEBI (Investment Adviser) Regulations, 2013 and other applicable provisions, Regulations and Act.

Client Signature

Name of Client

Date:

Place:



Compulsory Trading Strategy of Wealthchaser-

Strictly Follow Stop Loss

No matter what so happen. Whoever says, predict and influences you, strictly follow your stop loss which has been decided or given in SMS before entering trade. Stop loss is the most important rule of Professional Trading and it's A MUST.

Trade on SMS.

Medium of Services delivery shall be SMS only.

Trade in each and every recommendation and exactly as per Levels Provided

Do not execute the trade if mentioned rates/prices are not available. In case of any doubts and small confusion please call us. Please don't hesitate to call us and discuss the strategies. You pay us for that and we appreciate our customers calling us. We are here to serve you.

Trade In Equal Lot Quantity

Maintain uniform strategies for whole month, like if you start trading with 2 lots in each call than maintain the same for whole month. We would like to request you to please do not change your lot size for whole month. No matter scripts are different. All scripts should have to be traded in equal lots.

Refresh Your Mobile and Keep Trust

Please refresh your mobile (Switch Off and On) once in a day. Morning time will be good and make sure your Inbox has a good space. Do not panic in Stop Loss call situation. Go for next; your losses can be recovered.