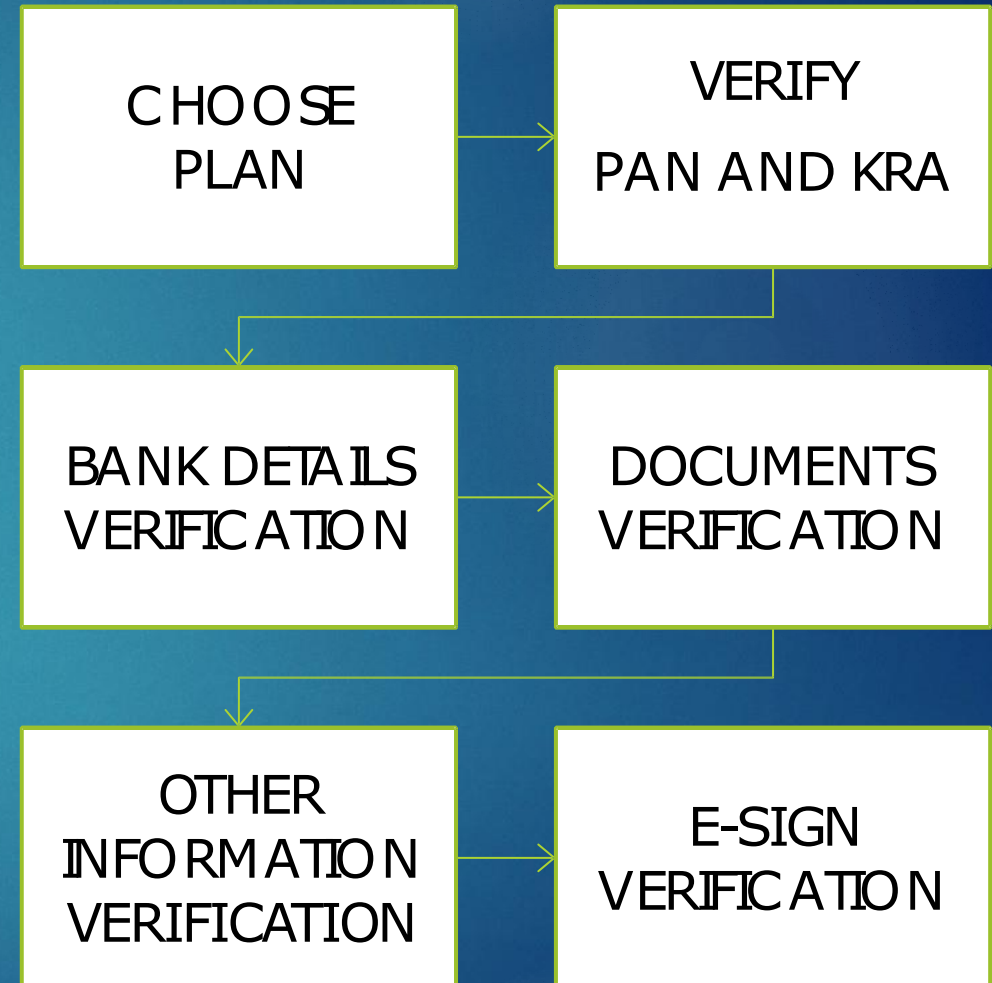


# CRM Module


## THE SIX-STEPS ACCOUNT OPENING PROCESS FOR INDIVIDUAL ACCOUNTS





# The account opening sign-up screen


## Zero Account Opening Charges\*


LIMITED PERIOD OFFER


 First Name \*

 Mobile \*

 Mobile Relationship \* ▾

 Email \*

 Email Relationship \* ▾

 City \* ▾

If you have a Branch or Group Code?

[OPEN AN ACCOUNT](#)

[RESUME APPLICATION](#)

# Branch or Agent Code

To be filled in case of Account being opened from Branch or SHL Authorized Agents

## Zero Account Opening Charges\*

LIMITED PERIOD OFFER

First Name \*

Mobile \*

Mobile Relationship \*

Email \*

Email Relationship \*

City \*

If you have a Branch or Group Code?

Branch/Agent Code

[OPEN AN ACCOUNT](#)

[RESUME APPLICATION](#)

# The 2-step verification process

Mobile Verification ✕

Mobile OTP \*

---

**RESEND OTP** **VERIFY OTP**

**Note : Mobile number should be registered in adhar card.**

Email Verification ✕

Email OTP \*

---

**RESEND OTP** **VERIFY OTP**

**Note : Mobile number should be registered in adhar card.**

# Choose Your Plan

PLAN    PAN AND KRA VERIFY    BANK DETAILS    DOCUMENTS    OTHER INFO    NOMINATION DETAILS    E-SIGN

<p>LIMITED PERIOD OFFER</p> <p><b>Free</b></p> <p>₹ 500</p> <p>₹ 0</p>	<p>1-Year</p> <p>₹ 500</p> <p>₹ 350</p>	<p>5-Years</p> <p>₹ 2500</p> <p>₹ 1400</p>	<p>10-Years</p> <p>₹ 5000</p> <p>₹ 2350</p>
--	---	--	---

[Click here to view Demat Tariff.](#)

NEXT

# PAN & KRA Verification

PLAN **PAN AND KRA VERIFY** BANK DETAILS DOCUMENTS OTHER INFO E-SIGN

Pan Verification

Pan Number

Enter your PAN number and Date of birth & click Verify

# PAN & KRA Verification

PLAN **PAN AND KRA VERIFY** BANK DETAILS DOCUMENTS OTHER INFO E-SIGN

Pan Verification

Pan Number \*  Date Of Birth (DD-MM-YYYY) \*

Holder Name As Per Pan

First Name As Per PAN  Middle Name As Per PAN  Last Name As Per PAN

**If the details are correctly entered name as per PAN Card will appear**



# Bank Details Verification

PLAN PAN AND KRA VERIFY **BANK DETAILS** DOCUMENTS OTHER INFO E-SIGN

**Bank Details**

IFSC Code \* MICR Code Account Type Bank Account Type Account Number \* **VERIFY BANK ACCOUNT DETAILS**

**Search IFSC Code in case you do not know**

Search IFSC Code?

Bank Name Bank Branch Name

**Fill in the bank and UPI Details here & Click 'Verify Bank Account details'**

**UPI Details**

UPI Id **VERIFY UPI DETAILS** Name

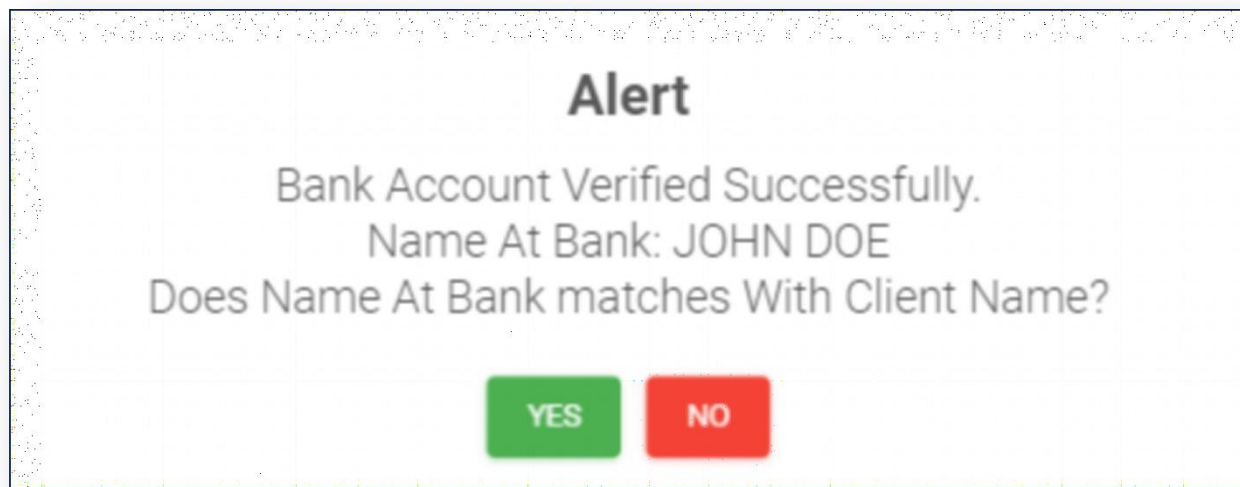
**To Verify UPI Id, enter your UPI Id and click Verify UPI details**

**If you have mentioned correct UPI Id, the Name of the UPI Id holder will appear here**

**NEXT**



# Bank Details Verification



If bank details are correctly entered, you will get this pop-up, click 'Yes'

# Uploading the documents

Upload the documents as per the sizes mentioned below each option



PAN AND KRA VERIFY    BANK DETAILS    **DOCUMENTS**    OTHER INFO

### Upload Documents

**Pan Card \***   
Required as an ID proof  
**Maximum Image Size: 100 KB.**  
**UPLOAD**

**Signature Upload \***  
Write down your full signature on a blank, white piece of paper. Take a close-up picture of your signature and upload it.  
**Maximum Image Size: 25 KB.**  
**UPLOAD**

**Live Photo \***  
Hold the piece of paper or your mobile phone in front of the webcam / upload a photo such that the OTP and your face are clearly seen. Make sure the OTP is legible and can be captured.  
**Maximum Image Size: 100 KB.**  
**UPLOAD**

**Income Proof(Optional)**  
Mandatory to upload income proof for F&O /currency and commodity  
**Maximum Image Size: 200 KB.**  
**UPLOAD**

**Address Proof \***

Upload Aadhaar Card(original color photo) or choose to upload another proof  
**UPLOAD**

**Upload Selfie**  
Grab a quick selfie or Upload a Passport-size photo  
**Maximum Image Size: 50 KB.**  
**UPLOAD**

Note: Your Live Photo uploaded along with OTP will be the proof for In-Person Verification

# Address Proof

DOCUMENTS OTHER INFO

Address Proof \*

Upload Aadhaar Card(original color photo) or choose to upload another proof

UPLOAD

Upload Selfie

Grab a quick selfie or Upload a Passport-size photo

Maximum Image Size: 50 KB.

UPLOAD

You will have to upload Aadhar card, Selfie or Photograph

PLAN PAN AND KRA VERIFY BANK DETAILS DOCUMENTS OTHER INFO E-SIGN

← Back

Upload Documents

Maximum Document Image Size: 150 KB.

Proof Type

Unique Identification Number (ADHAAR) ▾

Aadhaar Last 4 digits \* Issue Date(DD-MM-Y... 📅 Expiry Date(DD-MM-Y... 📅

Name as per proof uploaded.

First Name \* Middle Name Last Name \*

Address Proof Details

Enter address as per the proof you're uploading

Address 1 \* Address 2 \* Address 3 \* Address 4(Enter City) \*

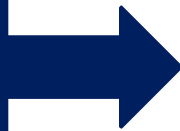
Country \* State \* City \* Pin Code \*

The above will be used as permanent as well as correspondence address.

Fill in the details here and upload the documents here

# Other Info

Fill in the required details here



NSDL, NSE & BSE EQ Segments will be activated by default

PLAN PAN AND KRA VERIFY BANK DETAILS DOCUMENTS **OTHER INFO** E-SIGN

### Personal Details

Gender:  Male  Female      Marital Status \*       Father's First Name \*       Father's Middle Name       Father's Last Name \*

Mother's First Name \*       Mother's Middle Name       Mother's Last Name \*

### Income and Other Details

Annual Income \*       Proposed Investment With SIHL \*       Source Of Income \*       Birth Place

Annual Income       Source Of Income       Birth Place

### Experience and Occupation

Trading Experience \*       Occupation \*

Trading Experience       Occupation

### Segment and Brokerage Details

NSDL     NSE\_EQ     BSE\_EQ     NSE\_FO     NSE\_CD     NSE\_CO     SLBM

Jobbing Brk: HHHH - JOBB ( 0.03 - 0.03 )      Delivery Brk: HHHH - DELI ( 0.30 - 0.25 )

**NEXT**

# Other Info

Segment and Brokerage Details

<input checked="" type="checkbox"/> NSDL	<input checked="" type="checkbox"/> NSE_EQ	<input checked="" type="checkbox"/> BSE_EQ	Jobbing Brk: HHHH - JOBB ( 0.03 - 0.03 )	Delivery Brk: HHHH - DELI ( 0.30 - 0.25 )
<input checked="" type="checkbox"/> NSE_FO	<input type="checkbox"/> NSE_CD	<input type="checkbox"/> NSE_CO	<input type="checkbox"/> SLBM	Derivative Brk: HHHH - JOBB ( 0.03 - 0.03 )

To activate any or all of F&O, Commodity, Currency & SLBM Segments, submit Income proof in the documents tab

**Alert**

Please Upload Income Proof Image.

OK

# Nomination details

*Fill up in details of the nomination here*

PLAN PAN AND KRA VERIFY BANK DETAILS DOCUMENTS OTHER INFO **NOMINATION DETAILS** E-SIGN

Nomination Details

I wish to make a first nomination

First Nomination Details

Name *	Pan Number	Date Of Birth (DD-MM-YYYY)	Relation *
Phone No	Mobile Number *	Email Address	<input type="checkbox"/> Minor Nominee
Percentage * 100	<input type="checkbox"/> Equal Nominee Percentage Distribution?		
<input type="checkbox"/> Address Same as Correspondence Address.			
Address 1 *	Address 2 *	Address 3 *	Address 4(Enter City) *
Country *	State *	City *	Pin Code *

Nominee Documents

Document Type Nominee Document Type	Document Proof No *	<b>UPLOAD</b>
--	---------------------	---------------

# E-Sign

NAVIGATION: PAN AND KRA VERIFY | BANK DETAILS | DOCUMENTS | OTHER INFO | **E-SIGN**

Summary

Name :

Email :  ✓ VERIFIED

Mobile :  ✓ VERIFIED

Bank Details :

Bank Details here

[I HEREBY CONFIRM ALL THE DETAILS →](#)

Check the details and click 'I hereby confirm all the details'

NAVIGATION: PLAN | PAN AND KRA VERIFY | BANK DETAILS | DOCUMENTS | OTHER INFO | **E-SIGN**

E-Signature

To successfully finish account opening procedure, let's proceed to e-Sign your submission.

[GENERATE PDF](#)

[PREVIOUS](#)

Click on Generate PDF




# E-Sign

PLAN PAN AND KRA VERIFY BANK DETAILS DOCUMENTS OTHER INFO **E-SIGN**

### E-Signature

To successfully finish account opening procedure, let's proceed to e-Sign your submission.



[VIEW APPLICATION PDF](#) → **Click on View Application PDF**

[PROCEED WITH E-SIGN](#)

[PREVIOUS](#)

# E-Sign

View & Download the Application PDF

## Document Viewer



SHAH INVESTOR'S HOME LTD.

### Annexure - 1 ACCOUNT OPENING KIT INDEX OF DOCUMENTS


S. No.	Name of the Document	Brief Significance of the Document	Page No
1.	Checklist for Account opening documents	Documents as mentioned in the checklist	2 to 4
<b>MANDATORY DOCUMENTS AS PRESCRIBED BY SEBI &amp; EXCHANGES</b>			
2.	CKYC and Account opening form(Trading and Demat)	A.Document captures the constituent and an instruction/check list.	5 to 8
		B. Document captures the additional information about the constituent relevant to trading account and an instruction/check list.	9 to 11
3.	Tariff sheet	Document detailing the rate/amount of brokerage and other charges levied on the client for trading on the stock exchange(s) (to be added by the stock broker).	12
4.	Policies and Procedures	Document describing significant policies and procedures of the stock broker (to be added by the stock broker).	15 to 18
5.	Rights and Obligations	Document stating the Rights & Obligations of stock broker/trading member, Authorised Person and client for trading on exchanges (including additional rights & obligations in case of internet/wireless technology based trading).	37 to 39
6.	Risk Disclosure Document (RDD)	Document detailing risks associated with dealing in the securities market.	40 to 43
7.	Guidance note	Document detailing do's and don'ts for trading on exchange, for the education of the investors.	44 to 45
8.	Rights and obligations For SLBS	Document stating the Rights & Obligations of stock broker/trading member, Authorised Person and client for trading on exchanges	48 to 50
<b>VOLUNTARY DOCUMENTS AS PROVIDED BY THE STOCK BROKER</b>			
9.	Security Trading using wireless technology	Internet & Wireless Technology based trading facility provided by stock brokers to the client	13
10.	Declaration	Declaration for trading and demat purposes	14
11.	Standing Instructions	Consent for smooth operational convenience	19 to 21

# E-Sign

PLAN PAN AND KRA VERIFY BANK DETAILS DOCUMENTS OTHER INFO **E-SIGN**

### E-Signature

To successfully finish account opening procedure, let's proceed to e-Sign your submission.



[VIEW APPLICATION PDF](#)

**Click on Proceed with E-Sign** → [PROCEED WITH E-SIGN](#)

[PREVIOUS](#)

# NSDL E-Sign

**Alert**

Digital Sign Using:

MOBILE OTP  BIOMETRIC

As you have opted for Manual Documents Upload, both Mobile OTP & Biometrics will appear

Click on Mobile OTP & Click OK

NSDL Electronic Signature Service

ASP Name	Shah Investors Home Ltd
Transaction ID	CRM_AOF_FH_811-20210611144538
Date & Time	2021-06-11T14:45:45

I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd.
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar:

[Click Here](#) to generate Virtual ID.  
[Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

You will be redirected to NSDL'S E-Signature Service

Click on Send OTP

# NSDL E-Sign

**NSDL eSign**  
Technology, Trust & Risk

**NSDL Electronic Signature Service**

ASP Name	Shah Investors Home Ltd
Transaction ID	CRM_AOF_F_811-20210611152245
Date & Time	2021-06-11T15:22:51

I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.

2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd.

3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UIDAI from time to time.

Enter OTP

**Success!** otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID.  
[Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

©2019 NSDL E-Governance Infrastructure Pvt. Ltd. All rights reserved.

Click on I hereby authorize



# NSDL E-Sign

**NSDL eSign**  
Technology, Trust & Risk

**NSDL Electronic Signature Service**

ASP Name	Shah Investors Home Ltd
Transaction ID	CRM_AOF_F_811-20210611152245
Date & Time	2021-06-11T15:22:51

I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.

2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these, for/with Shah Investors Home Ltd.

3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UIDAI from time to time.

Enter OTP  Verify OTP Cancel

**Success!** otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID.  
[Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

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Click on I hereby authorize

# Account Opened Successfully

Success

Token: 811.zip

Transaction ID:CB7CAC9717C1408B8B85659F75407205

[Download Signed File](#)

Ready to ride through the journey of investments &  
wealth creation



# In case the server or internet get disconnected in-between

Zero Account Opening Charges\*

LIMITED PERIOD OFFER

First Name \*

Mobile \*

Mobile Relationship \*

Email \*

Email Relationship \*

City \*

If you have a Branch or Group Code?

OPEN AN ACCOUNT

RESUME APPLICATION

Enter Mobile No to Resume Application

Mobile \*

CONTINUE

Click Resume Application and enter your mobile number

# Remember

- ▶ Online Account Opening Facility is currently ***available across India for Individual Account Opening only***
- ▶ For ***Individual Joint Holder, NRI and non-individual Account opening, an investor will have to visit the nearest branch and follow the existing system.***
- ▶ For using the online account opening facility, ***ensure that your Aadhar Number is linked to your mobile number.***
- ▶ During the entire account opening process, the information will be saved whenever you complete a step and click next.
- ▶ ***After completing the Account Opening Process, the client will receive an email with the pre-filled copy of Power of Attorney, Auto Debit Instructions and an unfilled Nomination form.***
- ▶ ***The client will need to sign the Power of Attorney, Auto Debit Instructions and fill the Nomination Form and send it across to the nearest SIH Agent or Branch.***
- ▶ Note: Verification may not be possible for some co-operative bank a/cs.
- ▶ Helpdesk number 079 68226822