

DIGI KYC - Unified On-boarding Assisted Journey

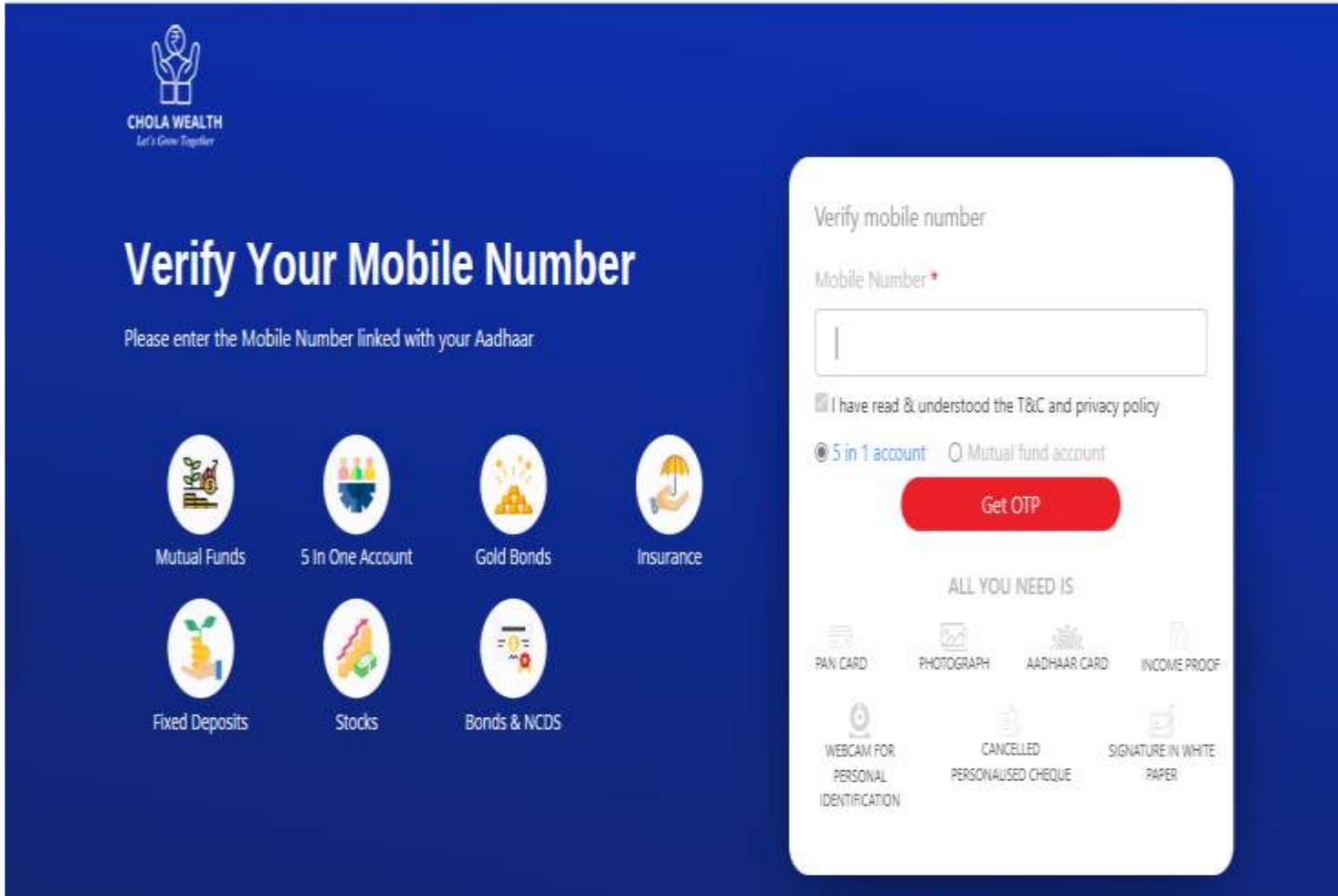
❖ Prerequisite

- ❖ Use only Latest version of Chrome / Firefox/ Safari browser
- ❖ Please ensure, mobile number is linked with Aadhar to proceed for e-Sign and Instant Account opening.
- ❖ Keep the documents / proofs ready before starting the account opening process (PAN image, signature image, Bank account proof, income proof for F&O)

❖ Important Instructions

- ❖ Kindly enable or give permission to camera , mic, location, Popup
- ❖ While taking live photo ensure the actual person is in front of the camera (do not show a photo of the person)
- ❖ While taking live photo ensure only the Applicant/KYC person alone is in front of the camera with plain background and ensure no other person is in the background – This is important as liveness is getting checked in this
- ❖ While taking live photo, kindly follow the instruction on the screen (place the face in the circle, avoid glaring light hitting the camera)
- ❖ Please go through the process manual of every steps for better understanding.
- ❖ Please do not click back / refresh key during the process And use only the existing URL link for reprocess, In-case if the system through any error / version timed during process.

To check your Email/ Mobile link Aadhaar – <https://resident.uidai.gov.in/verify-email-mobile>



CHOLA WEALTH
Let's Grow Together

Verify Your Mobile Number

Please enter the Mobile Number linked with your Aadhaar

Mutual Funds 5 In One Account Gold Bonds Insurance

Fixed Deposits Stocks Bonds & NCDS

Verify mobile number

Mobile Number *

I have read & understood the T&C and privacy policy

5 in 1 account Mutual fund account

Get OTP

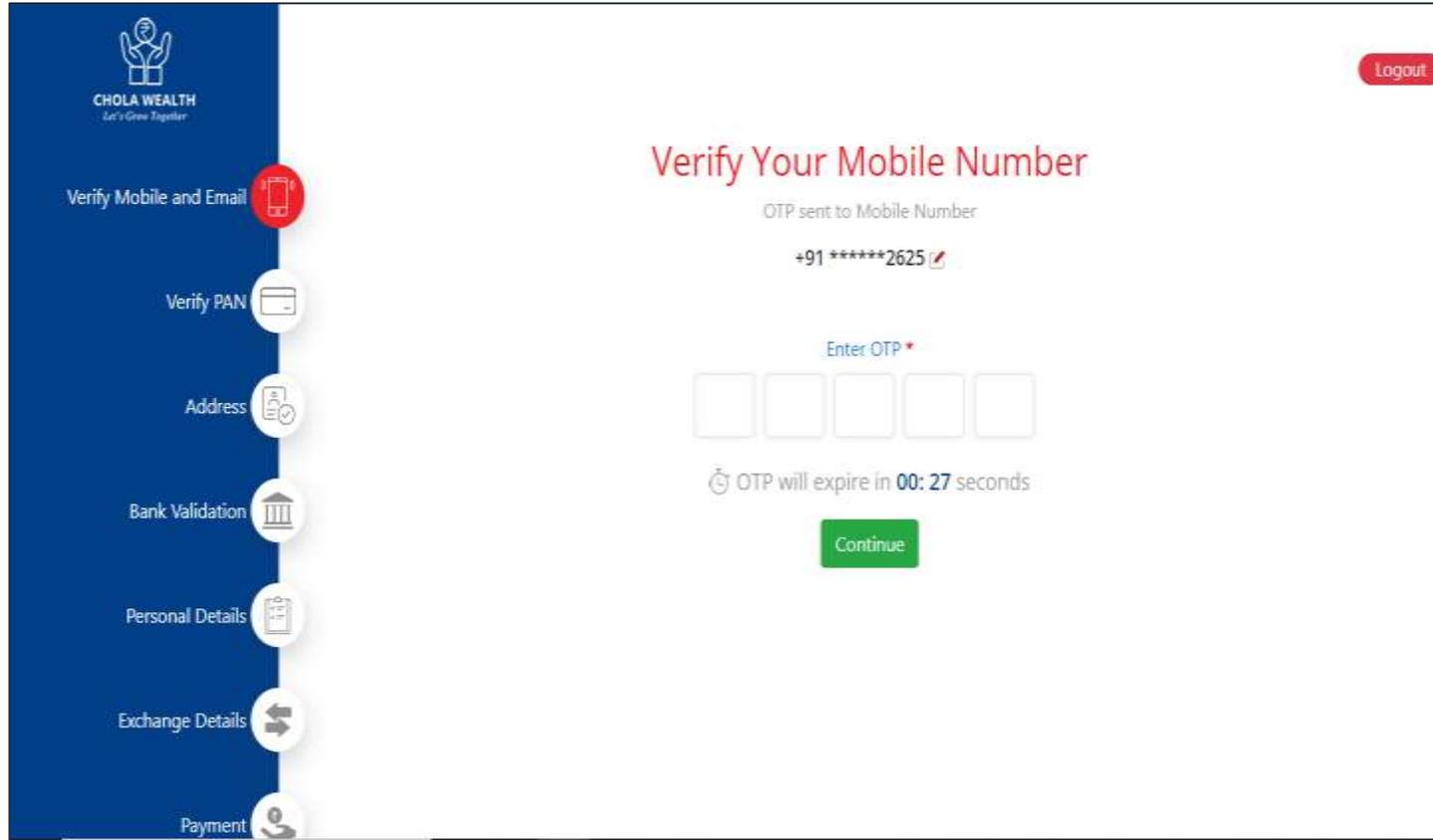
ALL YOU NEED IS

PAN CARD PHOTOGRAPH AADHAAR CARD INCOME PROOF

WEBCAM FOR PERSONAL IDENTIFICATION CANCELLED PERSONAUSED CHEQUE SIGNATURE IN WHITE PAPER

- On the landing page, you will have to type in customer mobile number and select either:
 - 5-in-1 account
 - Mutual Funds Account
- Finally you must select, **Get OTP.**

- You must then type in the OTP sent to the mobile number.
- After typing the OTP, screen will auto verify and move to next step



CHOLA WEALTH
Let's Grow Together

Logout

Verify Your Mobile Number

OTP sent to Mobile Number

+91 *****2625

Enter OTP *

OTP will expire in 00:27 seconds

Continue

Verify Mobile and Email

Verify PAN

Address

Bank Validation

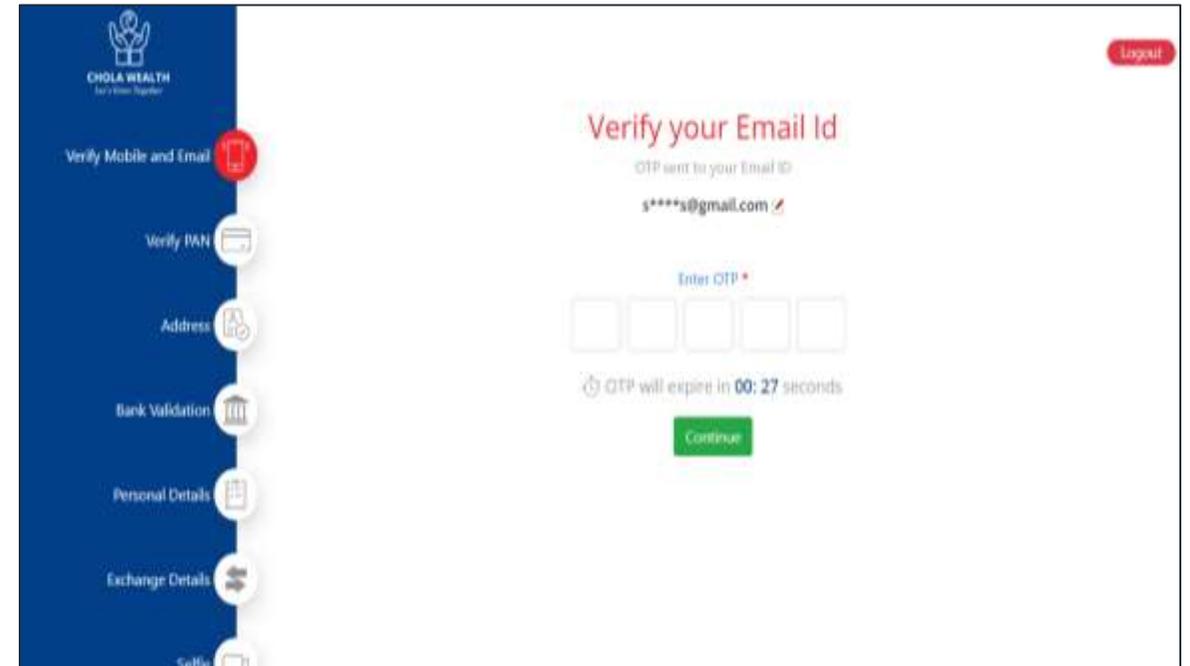
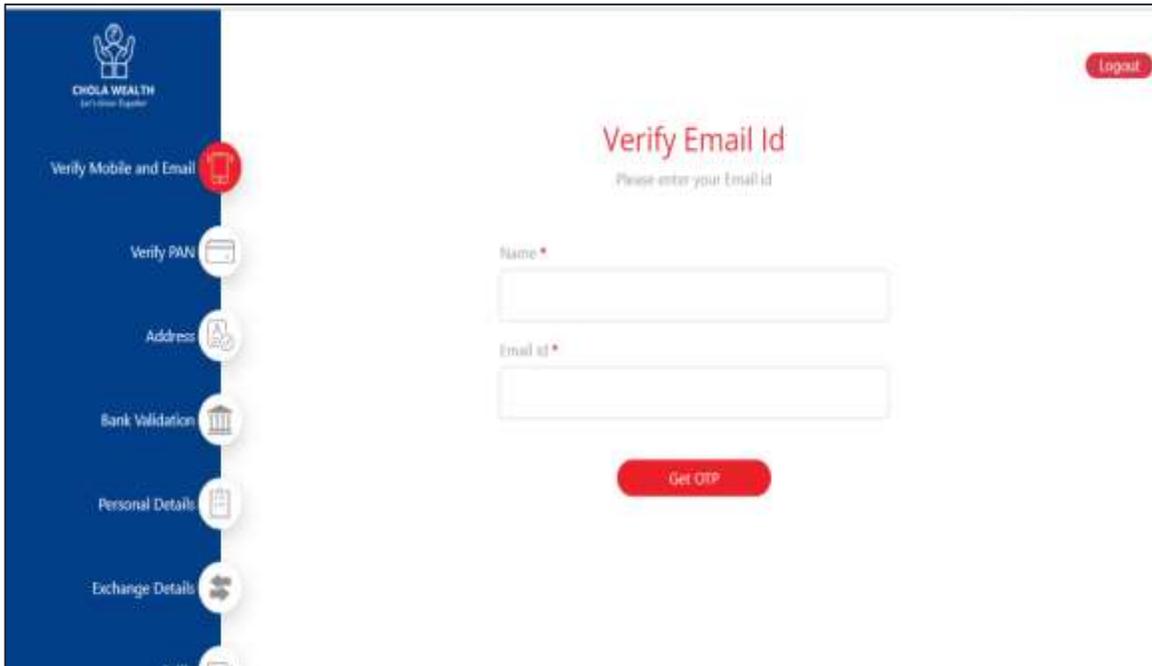
Personal Details

Exchange Details

Payment

- You must then type in your Full name and your Email ID
- Then you must select, Get OTP

- You must then type the OTP sent to your mobile number.
- Then screen will auto verify and move to next step”



- You must then type your:
 - PAN Card Number
 - Date of Birth

PAN Card Details
PAN Card is Mandatory for Transacting in Mutual Funds

PAN Card No. *

DD MM YYYY

I hereby authorize Chola Wealth Securities to fetch my personal details from CRA for the purpose of opening my Trading / Demat Account. I understand that the intermediary may share my KYC information and documents to SEBI, Exchanges, Depositories or other regulatory bodies, if required.

Submit

You must then upload a photo of your PAN Card and click “continue”

Upload PAN Card
PAN Card is Mandatory for Transacting in Mutual Funds

Upload a photo of your PAN Card to complete verification.*

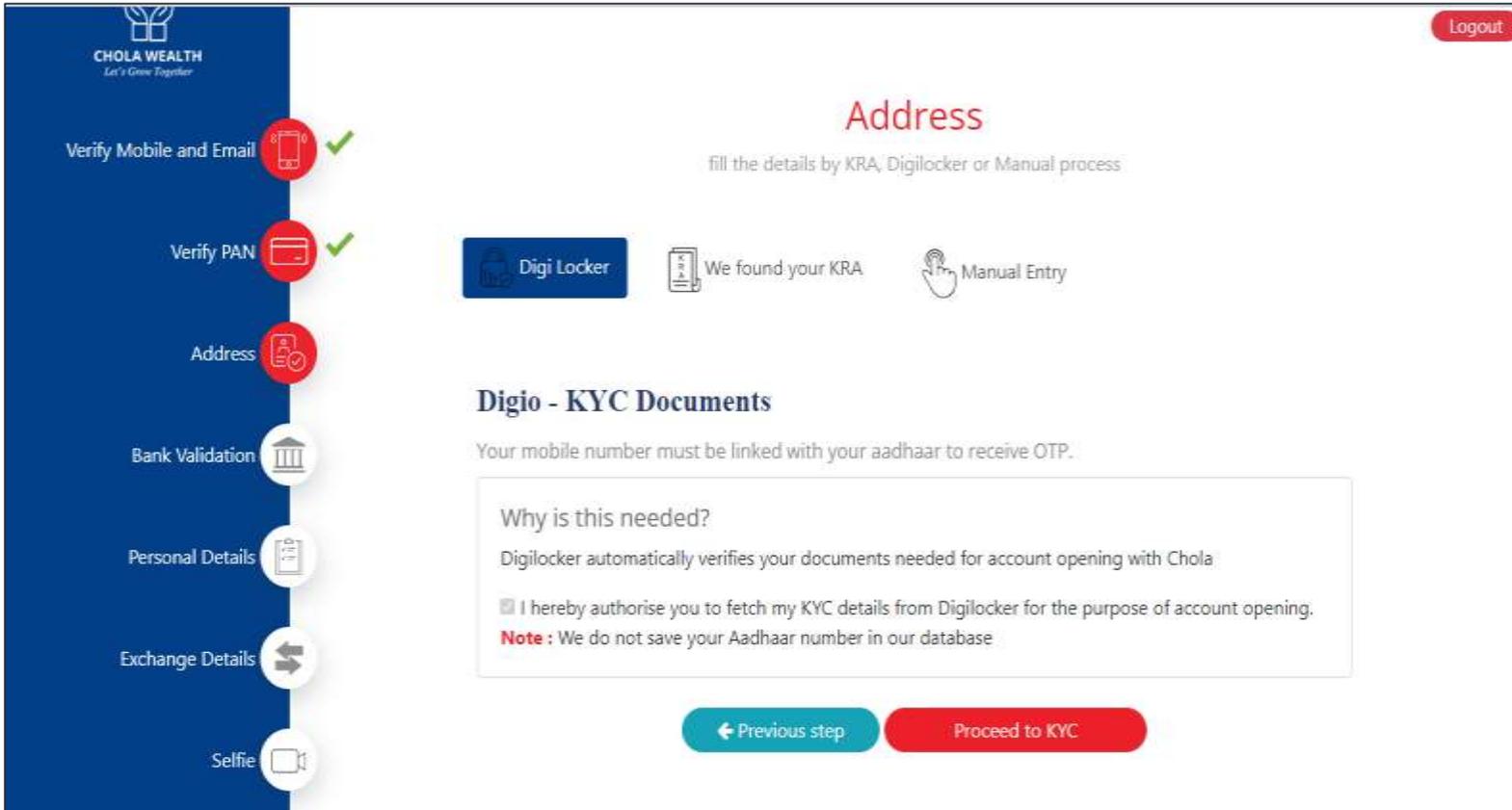
Choose File No file chosen

Previous step Continue

View Image

Note: Adjust image and click on 'Save'





CHOLA WEALTH
Let's Grow Together

Verify Mobile and Email ✓

Verify PAN ✓

Address

Bank Validation

Personal Details

Exchange Details

Selfie

Address

fill the details by KRA, DigiLocker or Manual process

Logout

Digi Locker We found your KRA Manual Entry

Digi - KYC Documents

Your mobile number must be linked with your aadhaar to receive OTP.

Why is this needed?
DigiLocker automatically verifies your documents needed for account opening with Chola

I hereby authorise you to fetch my KYC details from DigiLocker for the purpose of account opening.

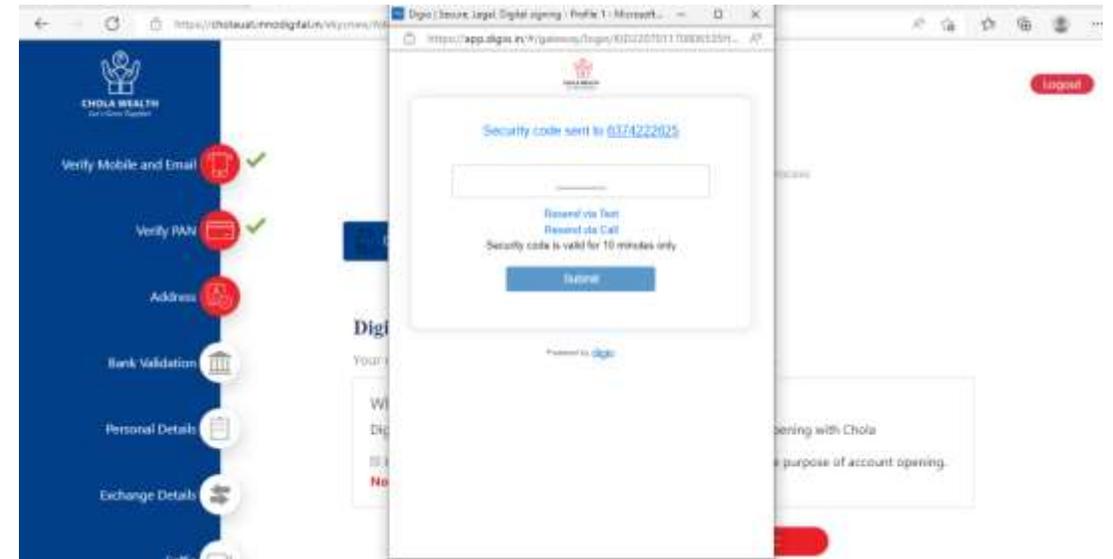
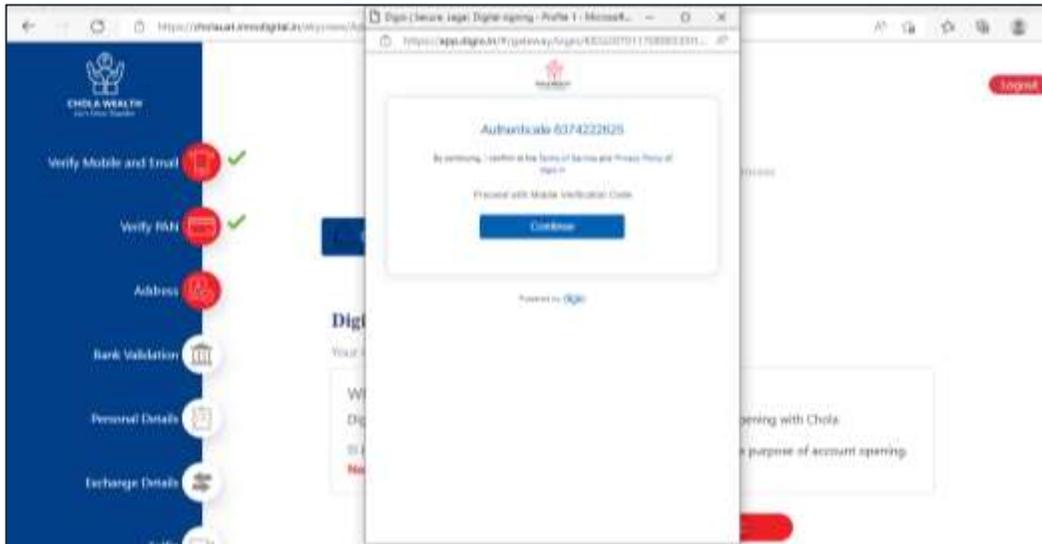
Note : We do not save your Aadhaar number in our database

← Previous step Proceed to KYC

- Primary will be KRA option for KRA registered clients & Other mode to fetch address details is through DigiLocker.
- For DIGI Locker, your mobile number must be linked to your address proof.
- In such a case, you can select the checkbox providing authorization to fetch documents from DigiLocker.
- Then click “Proceed to KYC”
- Manually Enter Address details with address proof upload option

- A security code will be sent to the mobile number to authenticate the same.
- You must click “continue” to obtain security code.

You must then type the security code sent to the mobile number and click “submit”



You must then select Authenticate Aadhar to fetch Aadhar from DigiLocker



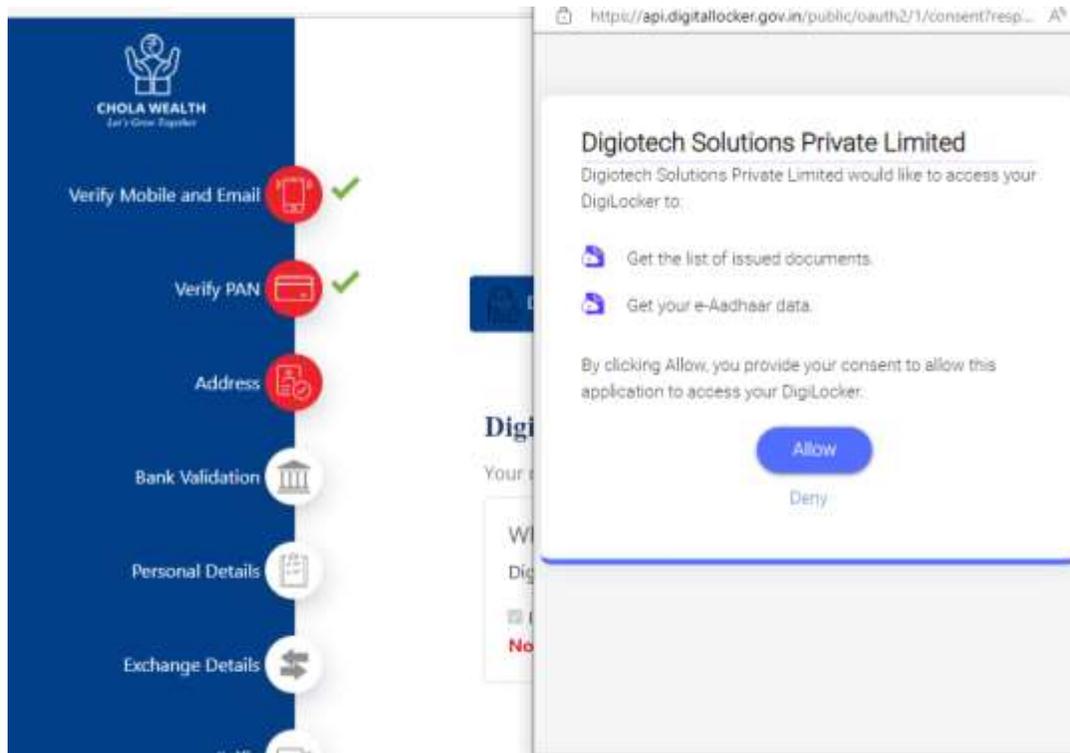
You must then type your Aadhar Number and click “next”



You must then type the OTP sent to your mobile number and click “continue”



You must then select allow to fetch Aadhar data from DigiLocker.



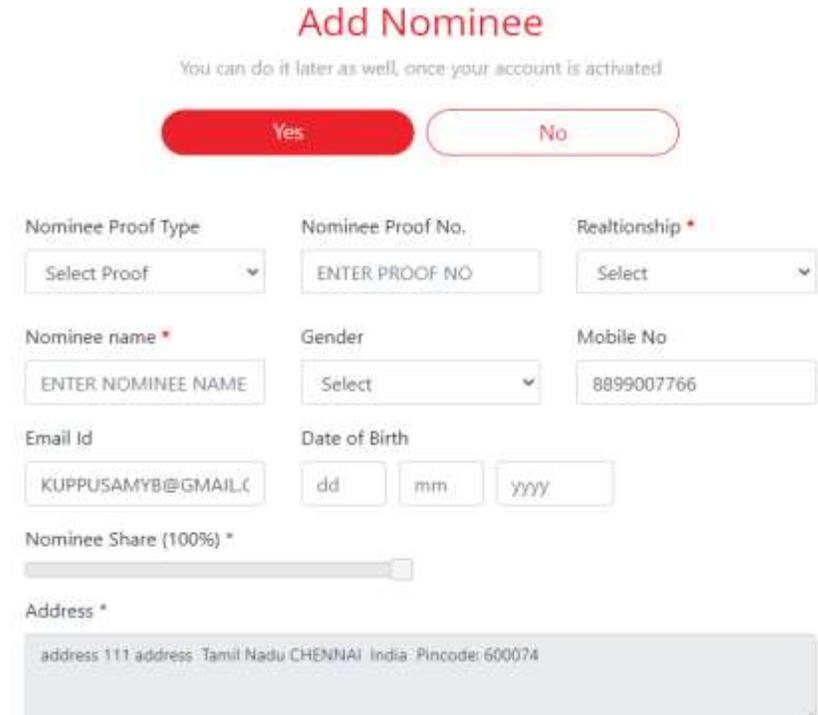
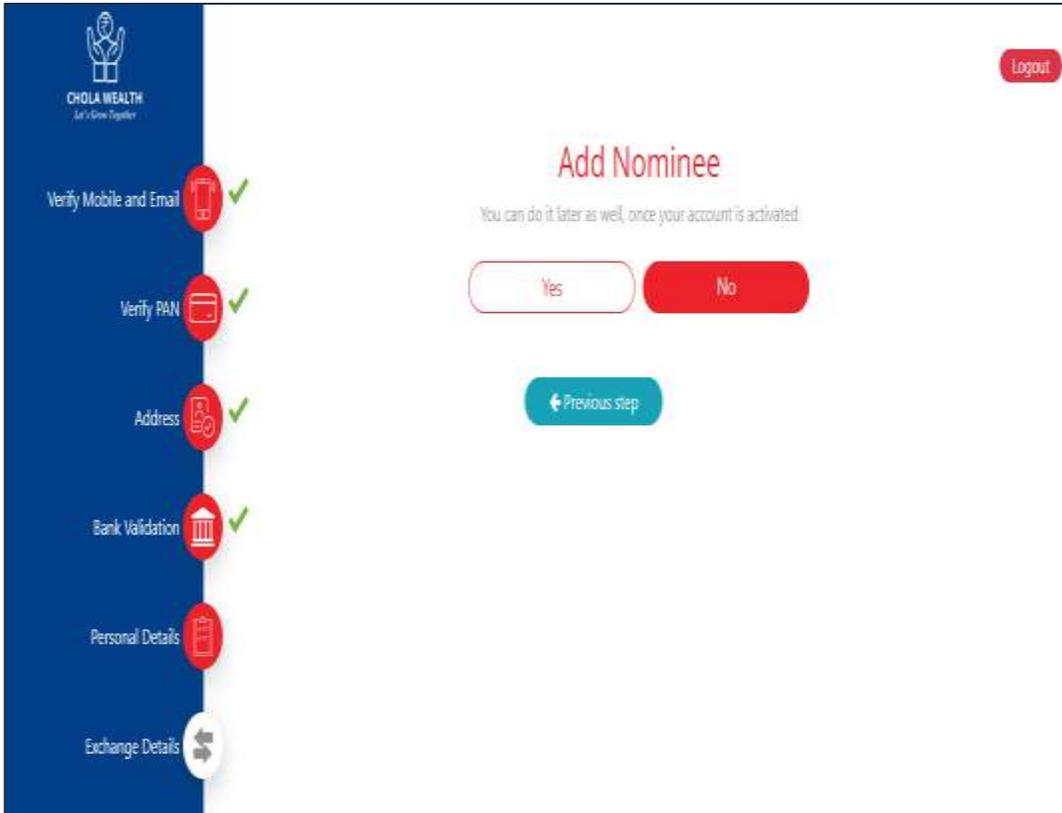
A window will appear stating that the KYC process has been a success. You will then see a pop-up stating that the address details have been saved successfully.



- You will then be requested to fill your personal details like your trading experience, income, occupation, father/spouse's name, marital status, gender etc.
- Then you must provide your declaration for the correctness of the information furnished and then you must click “save”

You will then get a screen stating that the profile details have been saved successfully.

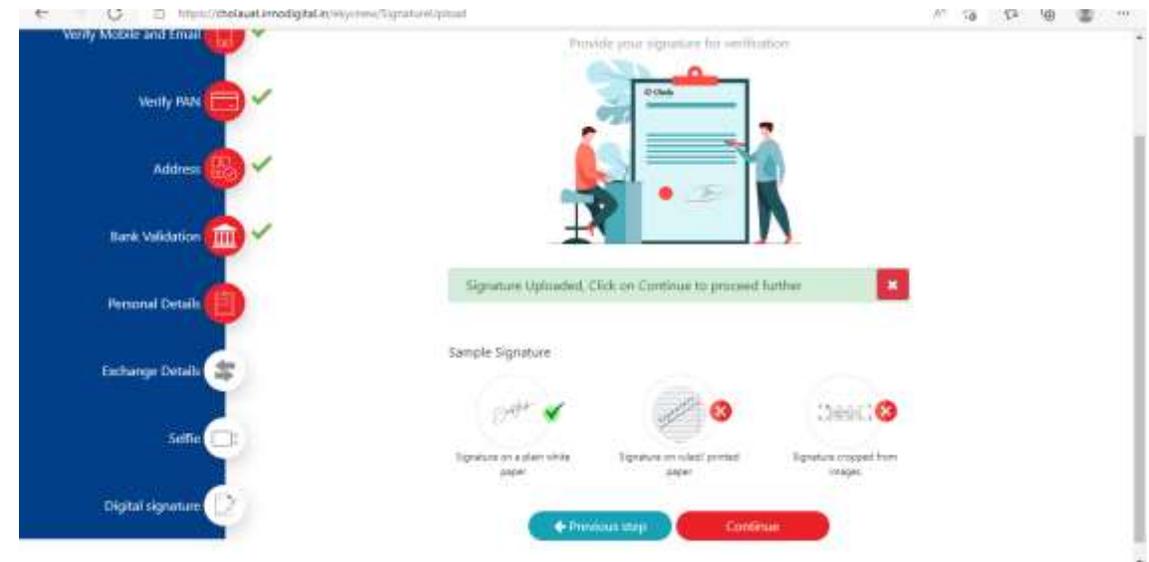
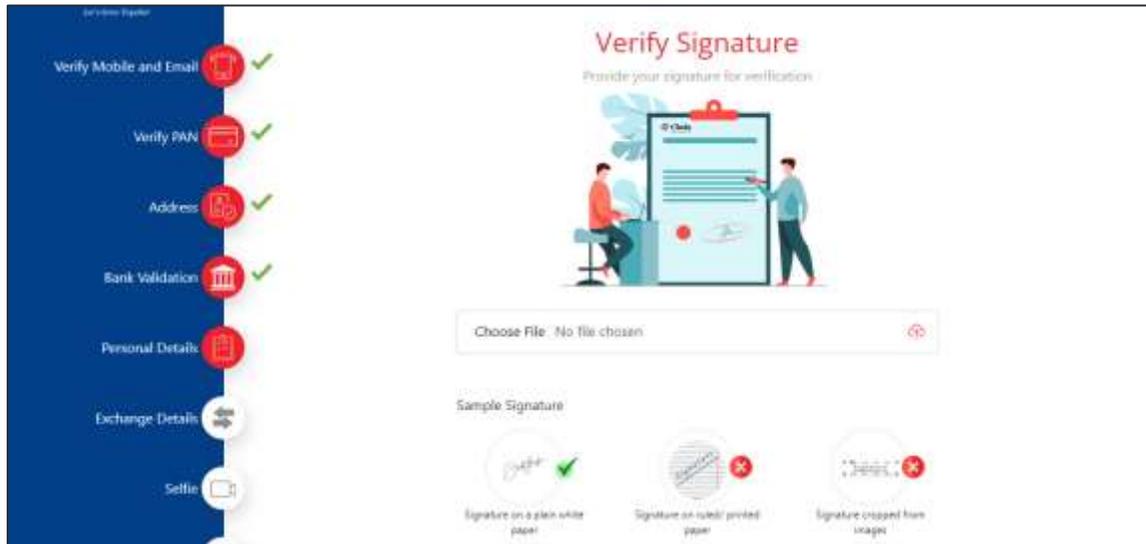
You will then be asked if you would like to add a nominee.



You will then see a screen confirming that the nominee details have been saved successfully.

You must then upload a file containing your digital signature.

You will then get a confirmation that the signature has been uploaded. You must then select “continue”



You will get a pop-up stating that the signature has been uploaded successfully.

- You must then select the segment you would like to engage with in the exchange of your choice.
- Then, you must provide your declaration for the same.
- You must then select a DP scheme (Normal Scheme or Security Deposit Scheme) to view DP tariff
- You must then select “save and proceed to next”

Exchange Details

NSE
 Cash F & O Mutual Funds
 Securities Lending and Borrowing

BSE
 Cash
 Mutual Funds
 Physical Mode Demat Mode

Segment/Exchange	Trading brokerage (%)	Delivery brokerage (%)	Minimum brokerage in (₹/lot)	Option brokerage in (₹/lot)
CM segment	0.05%	0.3%	₹ 1000	-

Please refer tariff sheet in the final PDF for other terms & condition.

DP Tariff

DP Tariff

Select DP scheme: Select DP scheme

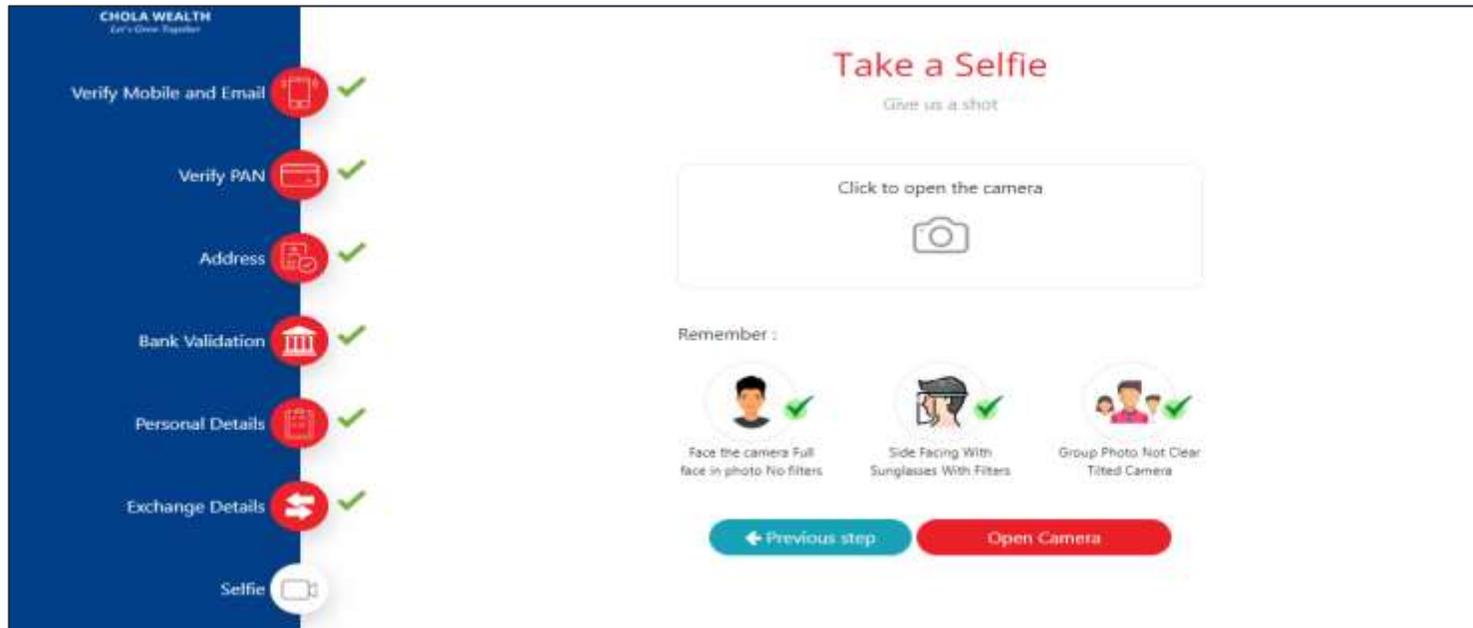
Offer Code
(optional)

I/We wish to trade in above selected segments of Bombay Stock Exchange & National Stock Exchange.
[Terms & Conditions](#)

Previous step Save and proceed to next

You will then get a screen stating that the exchange details have been saved successfully.

- You will then be asked to click a selfie for verification purposes.
- For this you must have front camera/webcam and you must allow access to take a picture.
- Select “Open Camera”

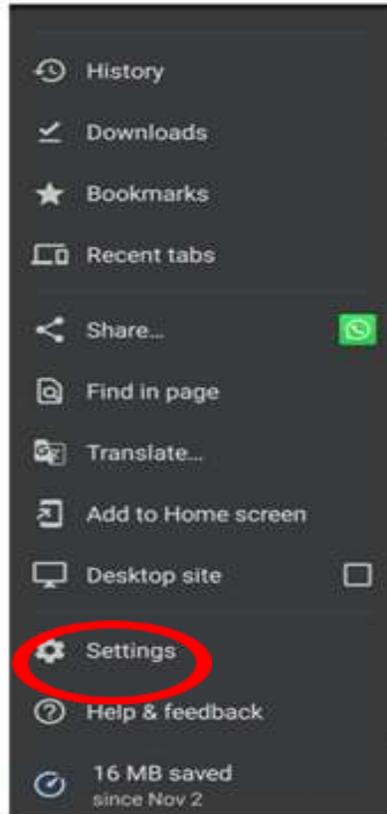


Pls ensure your phone setting is compatible to access Camera / Location & Microphone before recording IPV video.

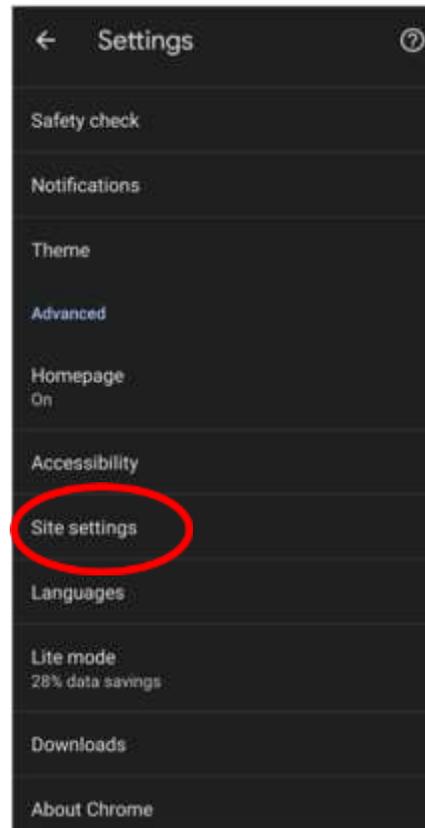
Step 1



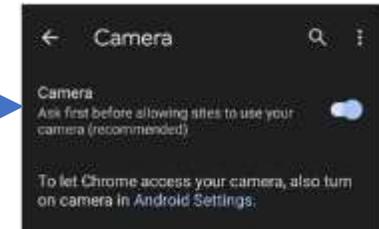
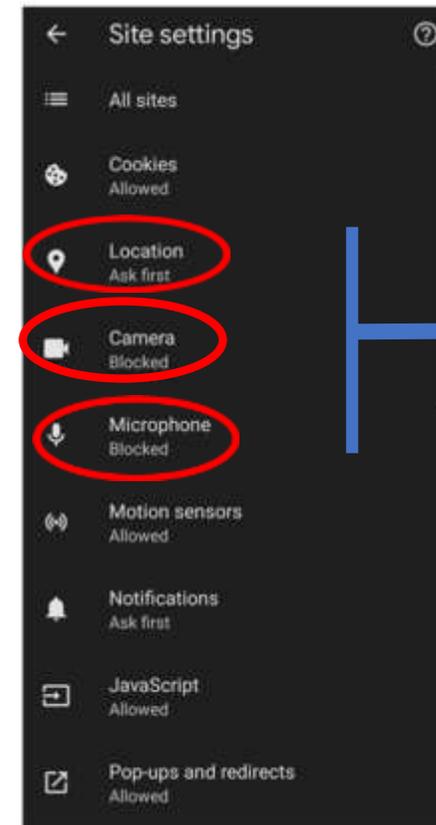
Step 2



Step 3



Step 4



System displayed the photo image with the pop-up message whether the captured is accepted or to be recapture. You can see there will be Green blink with Tick mark which confirms the image is Accepted. In-case if the image is not properly captured then there will be a red blink were you will have to recapture the image.

Click on save details once the image is properly captured.

Video KYC verification

Hi YUVARAJ, we have captured your images successfully and we are good to go, please click on "Save Details" to proceed further. In case you are not satisfied with the picture please click on re-capture button to re-capture your photo.



Photo

← Previous step

▶ Re-capture

📄 Save details

- ❖ Application PDF will be generated which you can verify it and downloaded if required.
- ❖ Edit Application - In case if customer request for any modification then click on edit application and proceed.



The screenshot displays the application PDF interface. At the top left is the Chola logo with the tagline "Enter a better life". At the top right is the Chola Wealth logo with the tagline "Let's Grow Together". Below the Chola logo is a large tree graphic where the branches are blue and the leaves are red circles containing various goal categories: Family Goals, Relationship, Career Goals, Wealth, Personal Goals, Business, and Health. To the right of the tree, the text reads: "Application No. 00410087" and "Chola Securities aspires to be your trusted partner in providing Wealth solutions and Growing Relationships." At the bottom, there are three buttons: "Download PDF" (red), "Edit Application" (yellow), and "Continue for Digital Signature" (teal).

Tick on check box “I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to –”
Enter Aadhar Number and click on send OTP - this option will be enabled only when the above check box is ticked.

Client receives OTP from Adhar. Enter the OTP and [click verify OTP](#)



NSDL Electronic Signature Service

ASP Name	Cholanandam Securities Limited
Transaction ID	a3e00001644193811190A1
Date & Time	2021-09-23T10:11:41

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.) Mutual Fund account for any one or combination of these for/with Cholanandam Securities Limited 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.) Mutual Fund account for any one or combination of these for/with Cholanandam Securities Limited.

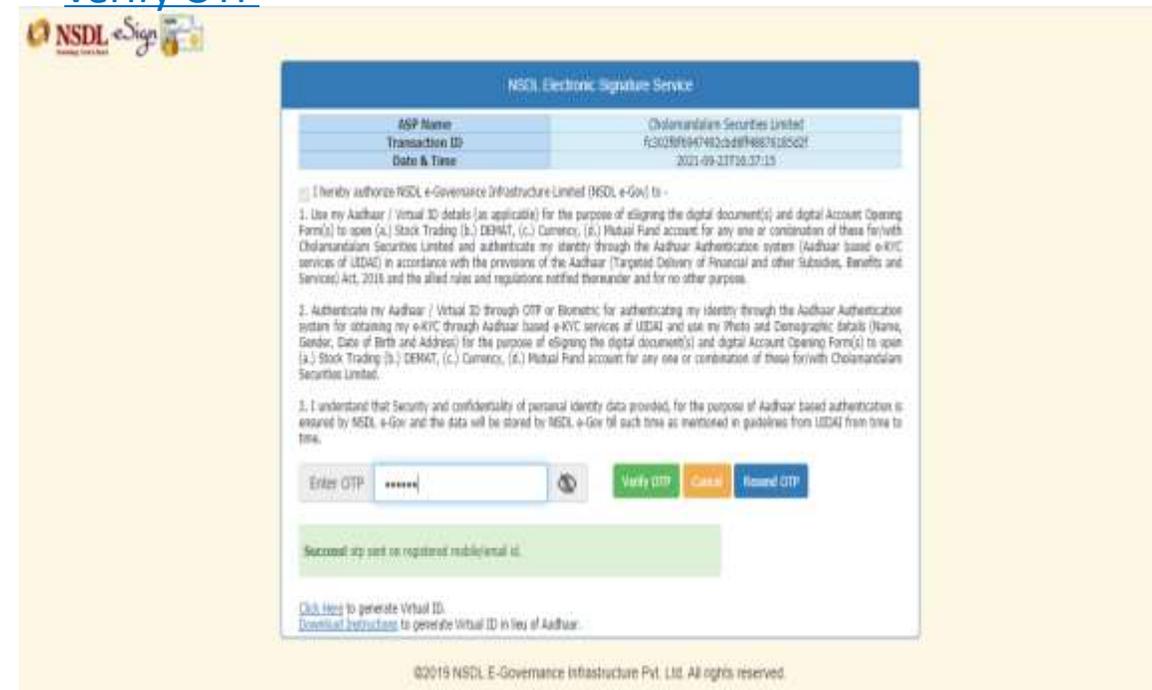
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar: 946473966891

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

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Please do not press "Send" button once again on the "Verify" or "Yes" button.



NSDL Electronic Signature Service

ASP Name	Cholanandam Securities Limited
Transaction ID	f3028f647482c0d9f887618502f
Date & Time	2021-09-23T10:37:15

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.) Mutual Fund account for any one or combination of these for/with Cholanandam Securities Limited 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.

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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: *****

Successful step 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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Congratulation KUPPUSAMY!

Your account has been submitted successfully



For transactions or any queries, Please contact
your
Relationship Manager or contact Customer
Care at
1800-425-4477 or email to

Thank You