

Introducer Enrollment Form

Constitution: Individual ☐ Proprietor ☐
(Tick Any One) Firm ☐ Company ☐

Company/Firm/ Proprietary/Individual Details:												Please paste recent photograph (Individual/ Partner/Director and sign across the photograph.)	
Applicant Name *													
Trade Name*													
Contact Person*													
Date of Birth/ Registration		D	D	M	M	Y	Y	Y	Y	Sex	M		☐
PAN/GIR											F		☐

Permanent/Registered Office Address:											
Address*											
		City:				PIN:					
		State:				Country:					
Telephone:*											
Mobile*											
E-Mail*											

Correspondence Address:											
Address*											
		City:				PIN:					
		State:				Country:					
Telephone:*											
Mobile*											
E-Mail*											
Current Occupation											

Personal Details of the Introducer :												
Name*												
Father's Name*												
Date of Birth*		D	D	M	M	Y	Y	Y	Y	PAN		
Residential Address												
		City:				PIN:						
		State:				Country:						
Telephone No.*										Mobile*		
Educational Qualifications												
Occupation												

Spouse Details (In case of Individual/ Proprietary):

Name*																	
Date of Birth *	D	D	M	M	Y	Y	Y	Y	PAN								
Educational Qualifications																	
Occupation	Housewife ☐ Employed ☐ Self Employed ☐ Business ☐ Retired ☐ Others ☐																

Information about Income, Investment and trading experience

Annual Income*		Less than Rs. 1 Lac		Rs. 1- Rs. 5 Lac
		Rs. 5 - Rs. 10 Lac		Rs. 10 Lac - Rs. 25 Lac
		> Rs. 25 Lac		
Annual Income in last 3 years:				
(1)	(2)		(3)	
No of Years of Experience	_____Yrs in Finance		_____Yrs in Others	
	Specify Others _____			
Experience in the capacity of	Sub Broker ☐ Mutual Fund Agent ☐ Insurance Agent ☐ Real Estate Agent ☐ Investor ☐ Any Others (Please specify)			
Experience in Working on Internet: _____ years				

Bank Account Details

Account Type	Savings/Current		Account No.											
Name of Bank														
Branch Address														
City					State:					PIN:				
MICR No.														

Business Potential

Number of Clients	Registered:				Active:			
Cities/Towns where present	Existing:				Proposed:			
Any other details								
Current Business Module	Office ☐ Freelancer ☐ Both ☐							
Currently doing business for the wing	MFs ☐ NBFCs ☐ Brokers ☐ Insurance Cos ☐ Banks ☐ Others ☐ NA ☐							