Nominee Addition / OPT out Online Process Thru MEON Re-KYC module:
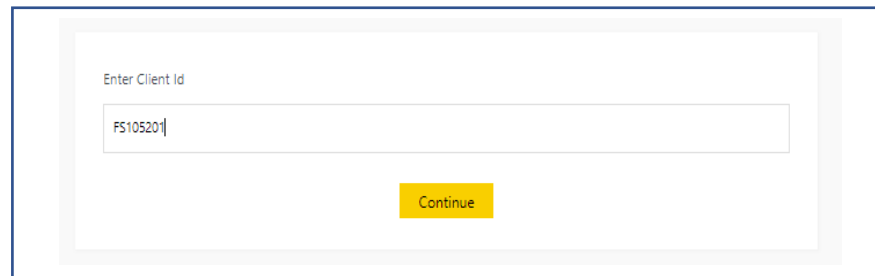
- Applicable for Trading account and /or DP account with Single holder mode only.
- Details Required:
  - Signature image of Account Holder (Client)
  - Nominee details: Name, Mobile No, Email Id, Address, Relationship, Share %, Proof of Identification Number (PAN/ Aadhaar – only last 4 Digits in case of Aadhaar)
  - Nominee ID Proof photo (PAN/ Aadhaar). This is Optional, however it is advisable to obtain for ease in processing in future. **Please note in case of Aadhaar given a documentary proof then make sure that first 8 digits are masked.**
  - **Please ensure that the supporting document/image uploads are in the requested formats and size, if they are out of size then appropriate cropping to be done before upload.**

PROCESS FLOW :
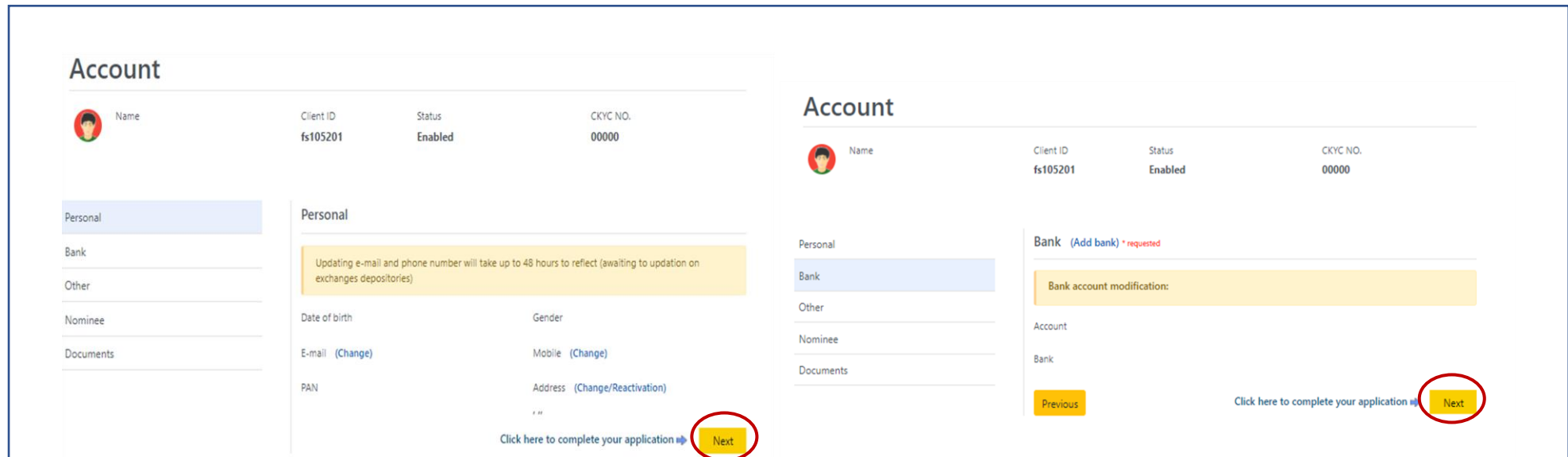
Login to Rekyc Portal : User Id and password.

Url: https://ekyc.way2wealth.com

Enter Trading Id and click "Continue".

Enter Client Id

FS105201

Continue

Click "**NEXT**" till you get screen to update "Segment, Income , and Nominee"

If client don't want to add Nominee to his Trading and/or DP account, then user must select "**Opted Out**".

If Client wants to add Nominee, then user must select **"Yes"** and click **"Next"**. (The check box "**No**" states that client don't want to make any changes in existing details in Nomination.)

Note: User may update latest income details in this screen.

Account

| | Name | Client ID
fs105201 | Status
Enabled | CKYC NO.
00000 |

Personal	**Others**
Bank	
Other	**BSE** ☐ Cash ☐ F&O ☐ Currency ☐ Commodity ☐ Mutual Fund
Nominee	☐ SLB
Documents	Segment **NSE** ☐ Cash ☐ F&O ☐ Currency ☐ Commodity ☐ Mutual Fund
	☐ SLB
	MCX ☐ Commodity

Annual Income   ---Select Income Slab--- ⌄

Annual Income Date   dd-mm-yyyy

Net Worth   _____

Net Worth Date   dd-mm-yyyy

Do you want to add/update nominee

☑ Yes ☐ No ☐ OPTED OUT

My sole country of tax residency India

☑ I have understood the information requirements of this Form (read along with FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on thi form is true, correct and compelete. I also confirm that I have read and understood the FATCA & terms and conditions below and hereby accept the same. Name for your account will be updates as per the Income Tax database due to Exchange regulations.

[Previous]   Click here to complete your application ➡ [Next]

Update **NOMINEE NAME, EMAIL ID, MOBILE NO, ADDRESS, RELATIONSHIP, SHARE %.**

Select Id Proof Type "**PAN/ AADHAAR**" and enter "**ID PROOF NUMBER**". In case of Aadhaar update on last 4 digits only.

Upload Image of Nominee Id Proof (Optional). In case of Aadhaar make sure that first 8 digits are masked.

Click **NEXT**.

Upload Account Holder Signature and Click "**Submit**".

Account

	Name	Client ID **fs105302**	Status **Enabled**	CKYC NO. **00000**

Personal

Bank

Other

Nominee

Documents

Upload Documents

Signature Specimen   [Browse...] No file Selected

Other Document   [Browse...] No file Selected

[Previous] Click here to complete your application ➡ [Submit]

In Home Screen select the application, select **UPDATE DETAILS**

2097	fs105302	Continue	Update Details	requested	no	no	no	no	no	yes	Complete	Generate PDF	Export

Update following in respective TAB.

Basic Details: Update Account Holder (Client) Name, email Id (Required to send link to esign), PAN.

Other : Update **DP CODE** (BOid with DP Id – 16 digit without special character),

       Select **DP & TRADING** – Update in DP and Trading

       Select **DP** ------ Update in DP Only

       Select **TRADING** ------ Trading in DP Only

       Select **INFORMATION UPDATION** .
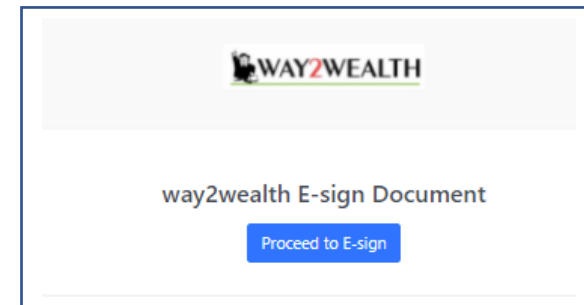

Save Application.

Submitted application will be visible in HO Verification login. Once verified the same application visible in Branch / Rekyc Login with E-Sign button to complete "eSign procedure".

Bucket	Esign	Complete	Reject												

Show 10 entries   Search: [   ]

Sr. No	Client Code	Action	Update Details	PAN	KYC Status	Customer Name	Mob No.	Email Change	Mobile Change	Address Change	Segment Activation	Bank Change	Nominee Change	Complete	Generate	Export
2050	fs1033	Continue	Update Details		requested	SUHAS HEBBAR		no	no	no	no	no	no	Complete	Generate PDF	Export
2051	fs1034	Continue	Update Details		esign_pending	SUHAS HEBBAR		yes	no	no	no	no	yes	Complete	Generate PDF	Export E-sign

Showing 0 to 0 of 0 entries   Previous   Next

Click on **ESIGN** then **PROCEED TO ESIGN.** It will navigate to NSDL Esign Portal.

Select Check Box and enter client's Aadhaar number, click **SEND OTP**.

Get OTP from client and **VERIFY OTP**.

way2wealth E-sign Document

Proceed to E-sign

NSDL Electronic Signature Service

ASP Name	Way2Wealth Brokers Private Limited
Transaction ID	UKC:eSign:9479:20230302134501852
Date & Time	2023-03-02T13:45:08

☐ 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 the purpose of digitally signing of documents for completion of KYC/KRA/CKYC for securities market for/with Way2Wealth Brokers Private 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 the purpose of digitally signing of documents for completion of KYC/KRA/CKYC for securities market for/with Way2Wealth Brokers Private 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: [   ]   Send OTP   Cancel

Click Here to generate Virtual ID.
Download Instructions to generate Virtual ID in lieu of Aadhaar.

NSDL Electronic Signature Service

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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.

This will complete eSign process.

- Note : Document Esign Charges of Rs. 25 + GST applicable, except for KRA record changes (Email, Mobile, Address) which will be Rs. 50/- +GST applicable