

## Documents / Details Required for KYC and CAN of Individual

### Basic Details:

- 1 **Name of 1st Applicant :** \_\_\_\_\_
- 2 **Gardian Name in case of Minor** \_\_\_\_\_
- 3 **Mobile Number:** \_\_\_\_\_
- 4 **Mail ID:** \_\_\_\_\_
- 5 **Mother's Name:** \_\_\_\_\_
- 6 **Place of Birth:** \_\_\_\_\_
- 7 **Nomination:** (More than one nominee can be added)
  - a. **Name:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **Relation:** \_\_\_\_\_ **Share(%)** \_\_\_\_\_
  - b. **Name:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **Relation:** \_\_\_\_\_ **Share(%)** \_\_\_\_\_
  - c. **Name:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **Relation:** \_\_\_\_\_ **Share(%)** \_\_\_\_\_
- 8 **Gross Annual Income:** Rs. \_\_\_\_\_
- 9 **Source of Wealth:** Salary /Business / Gift, Rent / Gift /Prise Money / Royalty  
(Tick relevant) Other(specify) \_\_\_\_\_
- 10 **Occupation:** Business / Professional / Agriculturist / Retired / House wifeStudent/ Doctor / Private Service / Public / Sector Service / Forex Dealer  
(Tick relevant) /Government Service

### Documents Required for KYC

- 1 Two passport size photographs
- 2 Self attested copy of PAN card (two copies)
- 3 Self attested copy of ADHAR card (two copies)

### Documents Required for CAN

- 1 Self attested copy of PAN card (two copies)
- 2 Cancelled cheque or Self attested copy of passbook first page or bank statement for all banks which you would like to get registered for mutual fund.(Your name, Bank Name, IFSC code, MICR code and Account Number should be clearly visible). (Two).

## Second holders Details for CAN

### Basic Details:

- 1 **Name of 2nd Applicant :** \_\_\_\_\_
- 2 **Mobile Number:** \_\_\_\_\_
- 3 **Mail ID:** \_\_\_\_\_
- 4 **Mother's Name:** \_\_\_\_\_
- 5 **Place of Birth:** \_\_\_\_\_
- 6 **Gross Annual Income:** Rs. \_\_\_\_\_
- 7 **Source of Wealth:** Salary /Business / Gift, Rent / Gift /Prise Money / Royalty  
(Tick relevant) Other(specify) \_\_\_\_\_
- 8 **Occupation:** Business / Professional / Agriculturist / Retired / House wifeStudent/ Doctor / Private  
(Tick relevant) Service / Public / Sector Service / Forex Dealer

## Third holders Details for CAN

### Basic Details:

- 1 **Name of 3rd Applicant :** \_\_\_\_\_
- 2 **Mobile Number:** \_\_\_\_\_
- 3 **Mail ID:** \_\_\_\_\_
- 4 **Mother's Name:** \_\_\_\_\_
- 5 **Place of Birth:** \_\_\_\_\_
- 6 **Gross Annual Income:** Rs. \_\_\_\_\_
- 7 **Source of Wealth:** Salary /Business / Gift, Rent / Gift /Prise Money / Royalty  
(Tick relevant) Other(specify) \_\_\_\_\_
- 8 **Occupation:** Business / Professional / Agriculturist / Retired / House wifeStudent/ Doctor / Private  
(Tick relevant) Service / Public / Sector Service / Forex Dealer