

Documents For **Portfolio Management Service (PMS)**

Documents Need For Opening **PMS Account (All Required)**

1. PAN card
2. Photographs
3. Address proof – Aadhaar card
4. PAN and Aadhaar card copy of Guardian – If Nominee is minor
5. Second Holder – PAN and Aadhaar card copy
6. Bank proof – Any one of the following
7. Pre-printed canceled cheque in the name of the Account Holder If cheque not preprinted then – Bank statement / Passbook required In case a canceled cheque is given in the name of a proprietary firm then a bank letter along with a bank stamp is mandatory.
8. FATCA Declaration
9. Copy of the POA provided to the PMS
10. Demat
11. Term Sheet