

Portfolio Management Service (PMS) Account Opening Checklist:

HUF

- Portfolio Management Service Account Opening Form & Agreement – (Duly stamped and signed by Karta)
- Member Client Agreement -(Duly Stamped and signed by Karta)
- IL&FS Set -Demat Account Opening form, HDFC Account Opening Form, POA, Authority letter etc (Duly Stamped and signed by Karta)

Proofs required:-

Passport size Photographs of Karta	6 Photos
Photocopies of PAN of Individual duly self attested and stamped	8 copies
Photocopies of PAN of HUF duly self attested and stamped	8 copies
Photocopies of Address proof of Individual duly self attested and stamped (Any one address proof -Photocopy of Passport OR Ration Card OR Driving License OR Latest Utility Bill -Telephone/Electricity not older than 2 months)	8 Copies
Photocopies of Address proof of HUF Latest Bank passbook/statement (Duly self attested and stamped)	8 copies
Photocopy of acknowledgment of latest IT return files by HUF	1 copy
Original cancelled cheque copy from Individual Bank A/c	
Original cancelled cheque copy from HUF Bank A/c	
Cheque from HUF Bank Account for Rs.10,000/- in favor of HDFC BANK A/C "Name as per PAN of HUF"	

Note: We require all coparceners' signature on HDFC Account Opening form and declaration by HUF on letterhead as per the enclosed format. If the coparceners are minor we request you to provide photocopy of Birth Certificate -4 copies duly self attested by KARTA

Declaration On letterhead of HUF

Date

To,
Parag Parikh Financial Advisory Services Limited
130/132, Great Western Building,
1st Floor, S.B.S Marg, Near Lion gate,
Fort, Mumbai – 400 001.

Dear Sir,

I, the undersigned and the Karta of _____(HUF), disclose following details of our HUF and all its copartners;

Sr.	Name	Date of Birth	Relationship	Signature
1.				
2.				
3.				

I hereby, state that details mentioned as above are true and any change / update in them would be intimated to you in writing.

Thanking You,
Yours Faithfully,

Signature of the Karta along with Stamp

Name of the Karta: _____