

## Portfolio Management Service (PMS) Account Opening Checklist

### RESIDENT INDIVIDUAL

Documents to be executed:-

- Member Client Agreement with PPFAS – (Only 1st Holder's Signatures required)
- Portfolio Management Service Agreement with PPFAS- (All Holders' signatures required)
- ISSL (Custodian and Demat) - HDFC Account Opening and Opening Documents - (All Holders signatures are required)

Proof Required:-

SN	Documents	1 <sup>st</sup> Holder	2 <sup>nd</sup> Holder
1	Passport size photos	6 photos	4 photos
2	Identity Proof- Duly Self Attested Clear PAN Photocopy	7 copies	7 copies
3	Address Proof duly Self Attested - Documents valid as address Proofs -Photocopy of Passport <b>OR</b> Driving License <b>OR</b> Ration Card <b>OR</b> Latest Utility Bill (Not older than 2 months) Telephone/ Electricity Bill	7 copies	7 copies
4	Photocopy of acknowledgement of latest IT Return filed (If you are not filing return please provide us latest 1 year self attested bank statement)	1 copy	No Need
5	Cheque of Rs. 10,000/- in favor of "HDFC BANK LTD A/C `NAME OF THE 1ST HOLDER' "(As per PAN Card) Note : PI issue cheque from the first holder's a/c. First holder should sign the cheque.		
6	* If you wish to nominate, 2 passport size photos and PAN no. of the nominee for PMS Agreement and Demat Account opening form are required. Nominees' signature are required in PMS Agreement and Demat Account Form.  **If Nominee is Minor, Guardian's 2 Photos and Signatures are required.		

Note: Account opening process will take approximate 12 to 15 working days.