



❖❖❖ User Guide For RE-KYC ❖❖❖

1. RE-KYC LOGIN :-

- a. AP branch Login
- b. Direct Client Login

2. Enter Client Code :-

- a. AP Login – (no OTP required)
- b. Direct Client Login – (OTP required)

3. What to Modify :-

Example – Mobile Number, Email-ID , Bank Details , Address, Occupation/income , Nomination, Account Closure.

● In Case Of Mobile Number & Email-ID modification :-

- Existing Data will be displayed, you need to insert the modified/revised Data and then generate an OTP.
- Documents Required – PAN CARD & SIGNATURE.

● In case of Bank Account Modification :-

- Existing Bank account details will be Displayed, you need to insert the new Bank Account details.
- Documents Required – Cancel Cheque with name Printed/Bank Passbook/Bank statement.

● In Case of Address Modification :-

- Existing Adress details will be shown, insert the new Address Details.
- Documents Required – Aadhar Card/Passport copy/Voter ID/Driving License/NREGA JOB CARD/National Population Registered Letter (Anyone of the above with the new address updated)
- Next Step – Upload PAN CARD, Signature & Photo
- Next Step – IPV through link sent to the registered Email Address
- Next Step – Esign and generate OTP



❖❖❖ User Guide For RE-KYC ❖❖❖

- In Case of Occupation/Income :-
 - Changes in Income Range to be filled.
 - Documents Required – Self Declaration Form Regarding Changes income range.
- In Case Of Nominee Details :-
 - Add Basic details of the Nominee as PAN CARD, AADHAR CARD, And Share percentage.
 - Documents Required – PAN CARD/AADHAR CARD.
- In Case Of Account Closure :-
 - You need to select which account you want to close (Trading/Demat/Both) & Reason for Account Closure.

