

WEALTH COACH /PARTNER ENROLLMENT AGREEMENT



INDIVIDUAL/NON-INDIVIDUAL

PART A – DETAILS OF AMFI CERTIFICATION EXAM



AMFI CERTIFICATE NO: _____ DATE OF PASSING THE TEST _____

TESTING AUTHORITY: NCFM NISM

ARN No. _____ VALID UPTO _____ DD/MM/YY

NAME PRINTED ON ARN CARD _____

STATUS:

- Individual
- Proprietorship (Certificate of recognition must be attached)
- Partnership Firm (Certificate of recognition + Partnership deed must be attached)
- Pvt. Ltd. Co. (Certificate of recognition / Memorandum must be attached)
- Trust (Certificate of recognition / Trust Deed must be attached)
- Public Ltd. Co. (Certificate of recognition / Memorandum must be attached)
- HUF (ARN must be attached)
- Others Please Specify

PART B – PERSONAL DETAILS

NAME _____ DOB _____ DD/MM/YY

SEX: MALE FEMALE MARITAL STATUS: MARRIED SINGLE

| <u>Residential Address:</u> |
|-----------------------------|
| _____ |
| _____ |
| City: |
| Pin Code: |
| State: |
| Email: |
| Personal Contact: |

| <u>Office Address:</u> |
|------------------------|
| _____ |
| _____ |
| City: |
| Pin Code: |
| State: |
| Email: |
| Office Contact: |

Authorized Signatory _____ Initial _____

WEALTH COACH /PARTNER ENROLLMENT AGREEMENT



Code _____

Aadhar No. _____

Mobile No. _____

PAN No. _____

Wealth Coach's Signature

PART C – EXISTING BUSINESS DETAILS

Existing Mutual Fund Agent: Yes No

Insurance Agent: Yes No

Number of Years in agency business

Number of Branches

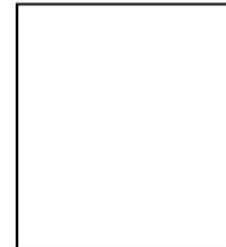
Number of persons engaged in marketing / sales Number of employees of mutual fund

PART D – FOR NON-INDIVIDUAL

NAME AND DESIGNATION OF AUTHORISED SIGNATORY

Name: _____

Designation: _____



Qualification: Non-Graduate Post Graduate Professional Others

Signature of the Authorized Signatory with company stamp

PART E – NOMINATION DETAILS: (FOR INDIVIDUAL ONLY)

Nominee Name: _____

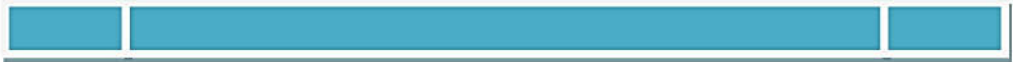
Address: _____

Nominee Relation: _____

Nominee Signature: _____

Authorized Signatory: _____

WEALTH COACH /PARTNER ENROLLMENT AGREEMENT



PART F – NEFT BANK DETAILS

NAME _____
BANK NAME _____
BRANCH _____ A/c TYPE _____
A/c No. _____
MIRC No. _____ IFSC Code _____

Wealth Coach's Signature

Signature of Bank Account Holder

NOTES:

IFSC Code is a11-digit alpha numeric code printed on the cheque leaves issued to you by your broker. If the same is unavailable in your cheque leaves you may contact your bank branch and obtain the same.
Please submit a cancelled copy of cheque along with this form.

Cancelled / photocopy of cheque of above-mentioned A/C.

PART – G: DOCUMENTS ATTACHED

- Copy of ARN Card (In Firm name in case of non-individuals) :
- Copy of AMFI Certificate (for individuals and partners representative) :
- Copy of Board of Resolution (in case of non-individuals) :
- Copy of Memorandum / Partnership Deed (in case of non-individuals) :
- Copy of PAN card :

PART – H:FOR OFFICE USE

BRANCH: _____
Business Associate Name: _____
RM Name: _____
Sub-Broker / Wealth Coach's Code: _____
Bank Account, ARN, RM, Branch in mapped in the system: Yes No
Wealth Coach's details entered & mapped by: _____

Signature– SOS Operation

RM signature

Branch Head Signature