

# **E-KYC** Process





This paper less and online solution helps its customers to directly Open Demat Account at their convenience, quickly.

It captures the following Information:

- Pan Number
- Mobile Number as per Aadhar
- E-mail
- Date of Birth (dd/mm/yyyy)

After filling all the above information, the user have to click on I agree Terms & Conditions. On click, it displays mark.

Click on the GET OTP Button, It sends a text message to your registered Mobile Number.

Any wrong or missing inputs will disable you to move further. Once this process is successful, click on the Resume Application Link.





#### Login screen for Sub Broker/AP/RM/Branches. User Name = your sub-broker code Password = we will text you.

💽 Mail - KYC Kunvarji 🗴   🍇 NEW KYC INWARD 🗴   🎯 :: kunvarji: KYC Adr: 🗴   📀 Member Portal 🛛 🗴	🕲 QuickBoard: Admin 🗙 🛛 🚥 ComRIS 🛛 🗙 🔇 QuickB	oard: Admin 🗙 🕂 V — 🗗 X
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	LOGIN	
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On successful login, you will see the following page.



#### This is the Dashboard for you.

Click on the Generate Account Opening URL

This will take you to a new page where in you will select Brokerage structure and DP Scheme.

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Individual Account Opening

You can select applicable Brokerage Scheme. You can select Options Scheme and DP Scheme in the same page.

o Mail - KYC Kunvarji 🗙 🚺 NEW KYC IN	IWARD 🗙   🔇 :: kunvarji: KYC Adn 🗙   🔇 Me	ember Portal 🗙 🛛 🏵 QuickBoard: Admin 🗙 🗌	🚥 ComRIS 🗙 🔇 QuickBoar	d: Admin × + ~	- 0 ×
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KUNVARJI Driven By Knowledge	Search By PAN Search for App	Ication Search			Logout (+
Login as: BHAVESH BASETA	Brokerage Scheme	Option Scheme	DP Scheme		
Dashboard	Select Brokerage scheme 🗸	Select Option scheme 🗸	Select DP scheme	~	
🖹 Ali (3)	Select Brokerage scheme Margin (Cash)-0 Margin (Cash)-25k-50K				
Pending (0)	Margin (Cash)-50k-1L Margin (Cash) >1L				
Esign Completed Applications ()					
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> Generate Account Opening URL					
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#### You can select Options Scheme

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KUNVARJI Siree 1990 Driven By Knowledge	Search By PAN  Search for Generate Accco	Application Sea	ط ng URL					Logout 🗭
Role: Relationship Manager Login as: BHAVESH BASETA	Brokerage Scheme	Option Scheme		DP Scheme				
Dashboard	Select Brokerage scheme	✓ Select Option	scheme 🗸	Select DP scheme	~			
<u>昌</u> All (3)		Select Option Margin (Cash) Margin (Cash)	scheme -0 -25k-50K					
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Esign Completed Applications ()								
Approved (0)								
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Completed (3)								
Reports -								
> Generate Account Opening URL								
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Individual Account Opening

#### DP Scheme in the same page.

💁 Mail - KYC Kunvarji 🗙 🛛 😰 NEW KYC II	NWARD 🗙 🛛 🏵 :: kunvarji: KYC Adr. 🗙 🛛 🔇 Mem	ber Portal 🗙 🛛 🌚 QuickBoard: Admin 🗙	ComRIS × S QuickBoard: Admin × +	~ - ø ×
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CURVERSE Driver By Knowledge Role: Relationship Manager	Search By PAN Search for Applic	t Opening URL		Logout ()
Login as: BHAVESH BASETA	Brokerage Scheme	Option Scheme	DP Scheme	
Dashboard	Select Brokerage scheme	Select Option scheme	Select DP scheme	
All (3)			Select DP scheme 18-TRAN15 28-1TAMC000	
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> Generate Account Opening URL				
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Type here to search	💽 🗖 👽	e 🤌 😼 🔳	🚔 25°C Smoke 🔿	5:34 PM

Once you complete selecting Brokerage Scheme, Options Scheme and DP Scheme and click on the "Generate URL", You see all the selections in a single screen like the below image.



## Individual Account Opening

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Mail - KYC Kunvarji 🗙 🛛 🏧 NEW KYC IP	NWARD 🗙 🛛 🎯 :: kunvarji: KYC Adm	x   🔮 M	ember Portal X 🛛 🚱	QuickBoard: Admin X	comRIS	X QuickBoard: Adr	min × +	·	^
← → C i ekyc.kunvarjiwealth.c	om/ekyc-admin/general/generate-	account-op	pening-url.aspx						1
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Role: Relationship Manager Login as: BHAVESH BASETA	Brokerage Scheme		Option Scheme		DP Scheme				
Dashboard	Margin (Cash)-0	~	Margin (Cash)-0	~	28-LTAMC999	~	Gen	ierate URL	
All (3)	Brokerage scheme								
Pending (0)	CashBrokerage	Туре	SchemeName	DeliveryPer	DeliveryMin	IntradayPer	IntradayMin	ModuleNo	
Esign Completed Applications ()	1	CASH	Margin (Cash)-0	0.5	0.05	0.05	0.05	2001	1
Approved (0)	Option scheme								
Rejected (0)	OptionBrokeragelD		Туре	SchemeName	FuturesPer	futureMin	OptionLot	ModuleNo	
Completed (3)	1		DERIVATIVE	Margin (Cash)-0	0.05	0.05	20	2005	
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> Generate Account Opening URL	SchemelD		SchemeName	Charges		DPModuleNo	Brokl	ModuleNO	
> Original POA not received	2		life time	999 plus GST		28-LTAMC999	c	DMT-3	
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#### You get the screen with a web link.

Click on "Copy Link", and give it your customers. This link will open your client & complete account opening process under your Branch Code.



## Individual Account Opening

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	Brokerage Scheme		Option Scheme		DP Scheme				
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Esign Completed Applications ()	Copy Link Go To Link								
Approved (0)	Brokerage scheme								
©= Rejected (0)	CashBrokerage	Туре	SchemeName	DeliveryPer	DeliveryMin	IntradayPer	IntradayMin	ModuleNo	
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> Generate Account Opening URL	OptionBrokeragelD		Туре	SchemeName	FuturesPer	futureMin	OptionLot	ModuleNo	
> Original POA not received	1		DERIVATIVE	Margin (Cash)-0	0.05	0.05	20	2005	
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Once you complete this, you will be taken to the login screen to get the eKYC done for your client.



#### **Reference Image 01**

PAN NU	MBER				
Mobile n	o as pe	er Aadhar			
E-mail					
dd		mm		уууу	
l agree <u>Te</u>	erms & C	onditions			
		GET O	TP		
	_				





The Resume Application Link will take you to the Login Screen. You can login by typing your PAN Number and Registered Mobile number as Password.

#### **Reference Image 02**

PAN NUMBER	2	
Mobile no as p	ber Aadhar	
	LOGIN	





Once the above two information is captured correctly, click on the Login Button and it will ask you to key-in an OTP hat you have received in Registered Mobile Number.

#### **Reference Image 03**

×

Once you verify the correct OTP, the system will find whether your KYC has done earlier or not. If you have done your KYC, you can select the first option "We found your KYC" else you can select "Digi Locker".





Once you key in your Date of birth as per KRA and click to continue, you will take you to a page were you will see a page with your address automatically filled.

Address from KRA	
Correspondence address:	
Address 1: 103, THE MEADOWS, GOKULDHAM	Address 2: SARKHEJ SANAND HIGHWAY
Address 3: SANAND	Country: INDIA
State: Gujarat 🗸	City: AHMEDABAD
Pincode: 380058	
Permanent address:	
Address 1: 103, THE MEADOWS, GOKULDHAM	Address 2: SARKHEJ SANAND HIGHWAY
Address 3: SANAND	City: AHMEDABAD
Country: INDIA	State: Gujarat 🗸
Pincode: 380058	
	Submit



From here the process are same for KRA and Digi Locker based verification.

Once this process is completed, it takes you to fill your Bank Details.





In this page, you select your Bank Name and type the IFSC Code to fetch the Bank Details.

•	Please Fill Your Bank
	Details
Bank Details	
Kunyarii ITD. All rights reserv	Choose your Bank
Bank of Baroda	
Search Branch (Min 4 Le	etters)
	Or
BARBODBSATE	

Once you select the Bank and Branch details, you have to confirm your Account number and you will get to see a message like:



Individual Account Opening



Once you confirm your account number by clicking YES, you will direct to a new page where you will be prompted to Upload and fill the Profile Details.



In this module, you have to upload your PAN Card & your Signature, duly clearly scanned. Any mistakes in the uploaded documents will result in doing the process over and again until is verified correctly and validated.



## Individual Account Opening



Upload PAN card				LUpload signature			
PAN Verified Successfull	У						
THE REAL PARTY AND	HI JI MENT th Hom How In Account No	HIVE HIVE HIVE GOVI. OF IN mber Card IA	DIA	Nei	ųν	sh!	
Marital Status		Trading experience		Occupation Type		Your Annual income	

Once this process is over, you need to select and fill other information in the next page.



#### You need to select the following:

- Marital Status
- Trading Experience
- Occupation Type
- Your Annual Income

Once this is completed, you have to select Father/Spouse Name and Salutation and input the Applicable Name.

Once this is completed, you have to select Father/Spouse Name and Salutation and input the Applicable Name; and to Input Mother's First Name, Middle Name & Last Name.

Marital Status	Trading experience	Occupation Type	Your Annual income
Select Marital status	Select Years of Experience	Select Occupation	Select Annual income
Father/Spouse name			
• Father O Spouse	Mr		
Mother's name			
Mrs	FIRST NAME	MIDDLE NAME	LAST NAME



Once this part is over, E-KYC requires Additional Information. It asks, do you wish to nominate?

Do you wish to nominate ?



If your option is No, then you can continue to the other Statement. If your selection is YES, then you have to fill Nomination Details like:

Do you wish to nominate ?

• Yes • NO

#### You can add up to 3 (Three) Nominees.

- Select Nominee Proof Type
- Input Nominee Proof Number
- Upload Proof
- Input Nominee Date of Birth in dd/mm/yyy format
- Input Nominee Name
- Select Relationship
- Address (system will fetch the information automatically)
- However, you can modify the Address, if you wish.
- Input Nominee Mobile
- Input Nominee Email ID
- Slide the Nomination Share

Nominee Details Captures ends here.

## Individual Account Opening



Nomination details	Total Nomination : 100(9
	Number of Nominees One
Nominee 1	
Nominee Proof Type	
Select Proof	
Nominee Proof No.	
ENTER NOMINEE PROOF NO	
🖾 Upload Proof	
Nominee Date of Birth	
dd mm yyyyy	
Nominee name	
Enter Nominee name	
Relationship	
Select 🗸	
Address	
S//	
Click here, incase you want to modify the address	
Nominee Mobile	
Enter Nominee Mobile	
Nominee Email ID	
Enter Nominee Email	
Nomination share (100%)	

## Individual Account Opening



×

Close

#### The next question for you to select is:

- Are you a politically exposed person?
- If your option is No, then you can continue to the other Statement.

Are you a politically exposed person?



If your selection is YES, the system alert you with a message like: Hi User (Your Name will appear here) Message "EKYC is not allowed for politically exposed person. Our Agent will connect with you for doing an offline KYC"

#### Message

#### The final question in this page is:

- Do you require DIS slip Book?
- You can select either Yes or No. if selected YES.

## Do you require DIS slip book?



## Individual Account Opening



#### To conclude the Profile Page, you have to select the following:

Mobile Number belongs to: You can select any one (Self, Spouse, Dependent family/children

Email belongs to: You can select any one (Self, Spouse, Dependent family/children

#### Select Qualification & Save and Proceed to the Next or go back to the Previous Step.

		←Previou	s step Save and proceed to next
Qualification	Plea	se Select	~
Email belongs to :	Self	○ Spouse	O Dependent family/children
Mobile number belongs to :	Self	○ Spouse	O Dependent family/children

Once you click on "Save and Proceed to next" you will be directed to the Exchange Module.



#### You can select the Exchange Segment suitable for you.

There are 4 (four) different Brokerage scheme are available and you can select any one from the dropdown. If you select Margin (Cash)-0, the applicable margin selected will appear in the form like:

#### **Exchange Segment**

<b>ONSE</b>	CASH F & O Currency Derivativ MF SLB	/e		CASH F&O Currence MF	y Derivative
	Commodity		O NCDEX	🗆 Commo	dity
Trade with Trust					
ariff details for Trade	ing & Demat Marqin (Cash)-0	~			
Trade with Trust ariff details for Tradi elect Brokerage scheme: CashBrokerage	ing & Demat Margin (Cash)-0 SchemeName Margin (Cash)-0	V DeliveryPer 0.5	DeliveryMin 0.05	IntradayPer 0.05	IntradayMin 0.05
Trade with Trust ariff details for Tradi elect Brokerage scheme: CashBrokerage 1 elect DP scheme:	ing & Demat Margin (Cash)-0 SchemeName Margin (Cash)-0 28-LTAMC999	► DeliveryPer 0.5	DeliveryMin 0.05	IntradayPer 0.05	IntradayMin 0.05
Trade with Trust ariff details for Tradi elect Brokerage scheme:  CashBrokerage 1 elect DP scheme: SchemelD	ing & Demat Marqin (Cash)-0 SchemeName Margin (Cash)-0 28-LTAMC999	► DeliveryPer 0.5 ► SchermeName	DeliveryMin 0.05	IntradayPer 0.05 Charges	IntradayMin 0.05



## Individual Account Opening

# If you select Margin (Cash)-25K to 50K, the applicable margin selected will appear in the form like:

#### Exchange Segment

🔇 NSE	CASH F & O Currency Derivative		CASH F & O Currency Derivative
METAL & ENERGY Trade with Trust	Commodity	O NCDEX	Commodity

#### Tariff details for Trading & Demat

Select Brokerage scheme:	Margin (Cash)-25k-50	к 🗸			
CashBrokerage	SchemeName	DeliveryPer	DeliveryMin	IntradayPer	IntradayMin
2	Margin (Cash)-25k-50K	0.4	0.04	0.04	0.04
Select DP scheme:	28-LTAMC999	~			
SchemelD	Si	themeName		Charges	
2		life time		999 plus GST	

## Individual Account Opening



**KUNVARJI** 

Driven By Knowledge

#### Exchange Segment

<b>O</b> NSE	<ul> <li>☑ CASH</li> <li>□ F &amp; O</li> <li>□ Currency Derivative</li> <li>☑ MF</li> <li>☑ SLB</li> </ul>			CASH F & O Currency I MF	Derivative
MCX	Commodity		D NCDEX	🗆 Commodi	ty
METAL & ENERGY Trade with Trust					
Trade with Trust	ing & Demat Margin (Cash)-50k-1L	•			
METAL & ENERGY         Trade with Trust         Gariff details for Tradi         Select Brokerage scheme:         CashBrokerage	ing & Demat Marqin (Cash)-50k-1L SchemeName	► DeliveryPer	DelīveryMin	IntradayPer	IntradayMin
METAL & ENERGY Trade with Trust         Cariff details for Tradi         Select Brokerage scheme:         CashBrokerage         3	ing & Demat Margin (Cash)-50k-1L SchemeName Margin (Cash)-50k-1L	► DeliveryPer 0.3	DeliveryMin 0.03	IntradayPer 0.03	IntradayMin 0.03
METAL & ENERGY Trade with Trust         Cariff details for Tradi         Select Brokerage         3         Select DP scheme:	ing & Demat Marqin (Cash)-50k-1L SchemeName Margin (Cash)-50k-1L 28-LTAMC999	► DeliveryPer 0.3	DeliveryMin 0.03	IntradayPer 0.03	IntradayMin 0.03
METAL & ENERGY         Trade with Trust         Gariff details for Tradi         Select Brokerage scheme:         3         Select DP scheme:         SchemeID	ing & Demat Marqin (Cash)-5Ok-1L SchemeName Margin (Cash)-5Ok-1L 28-LTAMC999 Sche	► DeliveryPer 0.3 ► emeName	DeliveryMin 0.03	IntradayPer 0.03 Charges	IntradayMin 0.03



## Individual Account Opening

If you select Margin (Cash) > 1 L, the applicable margin selected will appear in the form like:

#### Exchange Segment

<b>ONSE</b>	CASH F & O Currency Derivative MF SLB			CASH F & O Currency	y Derivative
	Commodity		O NCDEX	Commo	dity
Trade with Trust	ing 8 Domot				
Trade with Trust ariff details for Trad select Brokerage scheme:	ing & Demat Marqin (Cash) > 1L SchemeName	► DeliveryPer	DeliveryMin	IntradayPer	IntradayMin
Trade with Trust Fariff details for Trad Select Brokerage scheme: CashBrokerage 4	ing & Demat Marqin (Cash) >1L SchemeName Margin (Cash) >1L	► DeliveryPer 0.2	DeliveryMin 0.02	IntradayPer 0.02	IntradayMin 0.02
Trade with Trust ariff details for Trad select Brokerage scheme: CashBrokerage 4 Select DP scheme:	ing & Demat Marqin (Cash) > 1L SchemeName Margin (Cash) > 1L 28-LTAMC999	► DeliveryPer 0.2 ►	DeliveryMin 0.02	IntradayPer 0.02	IntradayMin 0.02
Trade with Trust Trade with Trust Trade CashBrokerage Scheme:  CashBrokerage 4 Select DP scheme: SchemeID	ing & Demat Marqin (Cash) >1L SchemeName Margin (Cash) >1L 28-LTAMC999	✓ DeliveryPer 0.2 ✓	DeliveryMin 0.02	IntradayPer 0.02 Charges	IntradayMin 0.02

Once you complete this, you will be directed to the Final Process Page to do the IPV (online In Person View).



If you are filling the information from a desktop that do not have the Camera, you may have to use a Laptop or use a Mobile for the IPV process.

If the device you are using is not having the camera, you will see the following page.



When you get a Camera enabled device, you have to do the login process:



## Individual Account Opening

	KUNVAR Driven By Knowledge
Open Demat Account Paper Less Process Research & Advisory Muti-Product Coverage	As if you have already started your application, Please fit in the details complete it.
Steps for Account Opening	98 534
Enter your mobile email and complete the online KYC & Personal detail verification	LOGIN
Upload proofs-PAN card Aadhar Number Signature on Blank White Paper Settle     Bank Account Details     Complete e-sign	5100.10

After you successfully login to the EKYC Application, you will see the following screen asking you to Show your face and click on "Capture Picture".



When you show your face to the camera, it displays your picture and ask you to click on the "Capture".



## Individual Account Opening



Once you complete the photo capture process, it will ask you to do an E-Sign process in a new page.

← → C ■ ekyckunvarjiwealth.com/POFPreview.aupr/luniq+6120at1e-b85b-467b-896c-b5a717967te7	ie 🖈 🗆 🕚	ł
🗱 Sign in to your acco 🤡 Film Tab. 🍄 Instruct Login M ginalizon 🛞 Velcome to adminia 🕲 DM Activity 🔄 Techtoral Branch L. 🔛 Performance of Mar		
Ні МАУ		
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		ł
You are just two steps away from opening your Demat & Trading account		1
		1
Step 1 Step 2		1
🔏 eSign KYC Form		1
eSign on KYC & Application Form is mandatory to complete your Account Opening Request		ł
I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my account opening form	i <sup>r</sup>	
Download PDF		
		1
nttps://ekyc.kurivarjiweaith.com 079-66669000 Customercare@kurivarji.com		



Individual Account Opening

You have to click on the "eSign KYC Form" you will see a new page wherein you have to type the OTP.

app1.legality.com/sign/cell	84e1-7ad1-4431-9a50-bfa85aee0ea2		
KUNVARJI Included			
	Please confirm your id One Time Password has been sent to may remaining makers	entity o your contact.	
		y	
	Abready a Lengelity worth Log in with A pro	owerd instead	

Once the OTP is successful, click on the "Proceed" and you will see the following screen to input another OTP.

NUNVARJ		
	How would you like to Sign using your Aadhaar?  OTP on phone Record OTP in Aadhaar registered phone nic or email  Name in signed document  M 20  Signed document will be sent to mayurpmodi@gmail.com and  91 36	
Cogaily		Back Proces



If you click on "proceed" you will be directed to a new page where you have to accept the Terms and Conditions.

Click on "Sign Documents" to complete the eSign Process.

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Once the above process is completed, you will be taken to this page to type your Aadhar Number and click on the **"Send OTP".** 

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3. I understand that Security and confidentiality of personal identity flata provided, for the purpose of Aadhaar based authentocon is ensuring by NSDL e-Gev and the data will be stored by NSDL e-Gev till such time as mentioned in guidelines from UIDA2 from time to time.	
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Click.teps to penerate Vehial ID. Described Instructions to penerate Vehial ID in Nex of Asthuae.	
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Individual Account Opening

Once you complete the above process, you will get an OTP in the mobile number registered with Aadhar.

Type the received OTP in this page and click on "Verify OTP".



You will be directed to a new page where it will mention that your "Documents Signed".





## Individual Account Opening

#### Now, you have to complete the KRA eSign Application Form. Click on the "eSign Application Form"



#### Once you click on the "eSign Application Form", you will see the following page:

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Once the OTP is successful, click on the "Proceed" and you will see the following screen to input another OTP.

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Conserver.		

If you click on "proceed" you will be directed to a new page where you have to accept the Terms and Conditions.

Click on "Sign Documents" to complete the eSign Process.

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### Individual Account Opening

Once the above process is completed, you will be taken to this page to type your Aadhar Number and click on the "Send OTP".

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Save the		I hereby authorize NSDL e-Governance Infr	astructure Limited (NSDL e-Gov) to -			
Available		<ol> <li>Use my Aadhaar / Virtual ID details (as eMandates and other onboarding documents through the Aadhaar Authentication system (<i>i</i> provisions of the Aadhaar (Targeted Deliver, 2016 and the allied rules and regulations notif</li> </ol>	applicable) for the purpose of eSigning of contracts, forms, for/with Grey Swift Private Limited and authenticate my identity adhara based = kNC services of UIDA1) in accordance with the of Financial and other Subsidies, Benefits and Services) Act, ed thereunder and for no other purpose.			
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You will be directed to a new page where it will mention that your eKYC process has been completed.





# THANK YOU

B-Wing, Siddhivinayak Towers, Nr D.A.V School, Next to Kataria House, Off S.G. Highway, Makarba, Ahmedabad – 380051

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