Univest Stock Broking Private Limited

Account Opening Process

Please keep the following documents ready in the prescribed format.

1. PAN - Original and clear scanned image. Capture your photo with PAN.

2. Signature on a white paper - Clear scanned image. JPEG Or PNG Format.

3. Cancelled Cheque leaf - Scanned image. IFSC and account no should be clearly visible. (If Bank Statement is not available)

4. Bank Statement [latest 6 months] in PDF format- Can be used in lieu of Cheque or as income proof. IFSC and Account no should be clearly visible. Should not be password protected.

5. Voter id or Driving License or Aadhaar Card or Passport in case DigiLocker KYC is not done - Clear scanned image of both sides. Ensure Driving License and Passport are valid for at least 30 days from today.

6. Can Opt for a Nominee (YES/NO). If YES, the nominee details are mandatory.

7. Other information-

   a) Please enter valid email id and mobile no. Preferably it should match with Aadhaar.
   b) Mobile should be under strong network to receive the OTP.
   c) Ensure PAN is active and seecded with Aadhaar.
   d) Keep Aadhaar details handly for esign. If mobile no linked to Aadhaar is different, please ensure you can access the OTP sent on this number.
   e) Please ensure internet connection is strong.
   f) Please keep camera ON, to capture real time photo. In case of video KYC, please ensure your voice is audible.
   g) Ensure device location is ON, and you are within the boundaries of India.
   h) Ensure bank details entered are valid and name as per bank record matches the name as per PAN. provided by Income Tax Department. This will help in paperless verification.
   i) Ensure name as per PAN and Aadhaar matches.

8. In case of Digilocker KYC, kindly unlock your Aadhar if it is locked, before starting the KYC.

9. Kindly ensure clear Aadhaar image with readable QR code is uploaded.

10. Please check if Aadhaar no is properly masked on front and reverse side at all places after uploading.

11. In case you face any problem, please feel free to contact the helpline mentioned on footer of this page.