

PMS – Resident Account Opening Documents – FOR INDIVIDUAL

All documents should be self attested by the Applicant – each 2 sets required

1. Passport size Photographs 2 – Photographs to be affixed on the Application and Signature to be affixed partially on the document and partially on the Photograph
2. Income Tax **PAN** Card Copy
3. Address proof - Copy of Aadhar Card or Passport or Ration Card or Voters ID or Electricity Bill telephone Bill or bank statement (not more than 2 months old.)

Please note that Driving License is considered as Identity Proof.

4. Cancelled Cheque and bank statement (not more than 3 months old)
5. Mother's Name required for CKYC

In case of Joint accounts:

- CKYC Form
- ORBIS Global Tax Information Form
- Joint holder's self attested Pan card copy and address proof – each 2 sets required.
- **PMS Agreement and POA (ORBIS) should be signed by the all joint Holders**

Nomination details : Mandatory in case of single holder account

In case Account Holder / Nominee is a Minor :

- Copy of Birth Certificate of minor
- For minor account holder : PMS application needs to be signed by Guardian
- For minor nominee : PMS Nominee form needs to be attested by Guardian
- Self attested copies of Proof of Identity and Proof of Address of Guardian

Note:

On Page Number 18 of the PMS Application, and Page Number 21 of the Disclosure documents (**A C Choksi**) the client should add in his/her own hand writing the following:

“I have read and understood fee structure”