

PMS Simplified Process Flow For Investing - Motilal Oswal AMC - For Lockdown

Dear All,

Please find the attached **PMS** simplified process for the below activities during

Lockdown for PMS from Motilal Oswal AMC.

- **New Account Opening for RI – (New Investments)**
- **New Code Creation for Existing Client Over Email – (Top Up)**

New Account Opening for RI:

1. We have prepared an excel with all the details required from the client like (Name, Address, Nominee Details, Phone Number etc). As the client provides us with basic details in excel format and certain documents like PAN, address Proof, Cheque Copy on Scan Basis.
2. Our Office boy will fill up the entire form on client's behalf.
3. We will send the scan copy of filled up form to the clients over e- mail, clients just need to sign those documents and send back the scan copies.
4. We will process the scan copies and open the account.

More Detail mentioned in New Account Opening Document which is attached.

New Code Creation for Existing Client Over Email – (Top Up)

1. Any client who is already invested with us can top up, by just transferring the amount and submitting the proof to our sales support – **No Documents required**
2. Also Clients who are invested and want to open new code **to invest with STP mode or New strategy creation** – the same can be done – if the **clients mails the details from his registered email id** in the format mentioned in New Strategy Creation Document.

Please get in touch for any clarifications