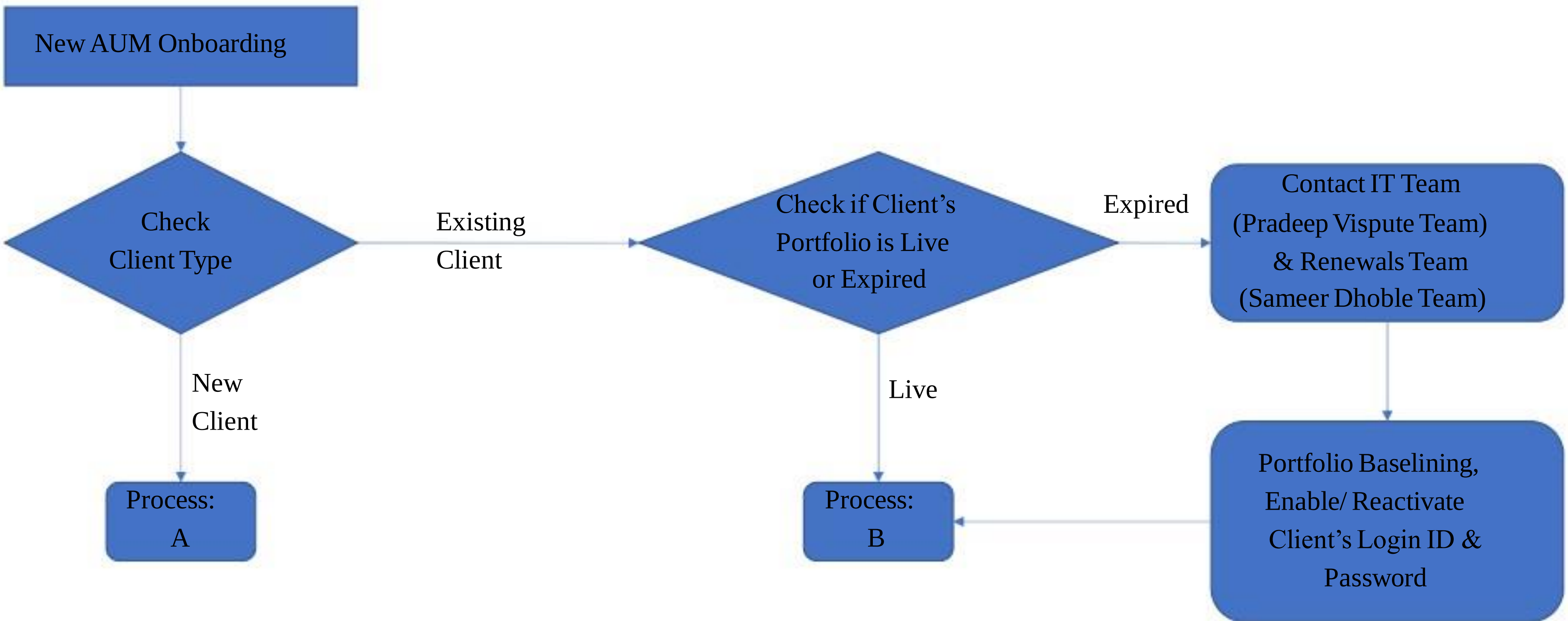
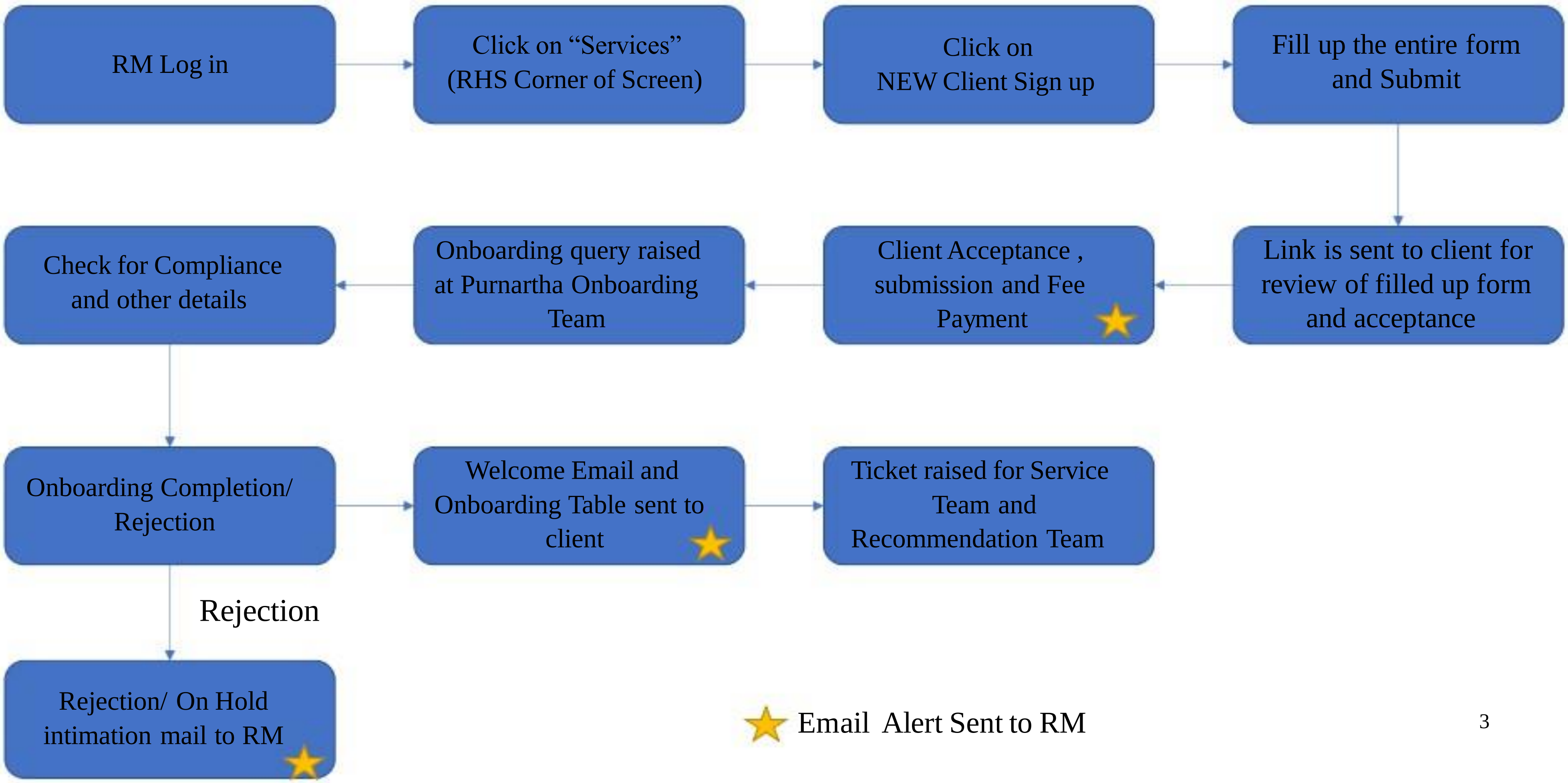


IMP Note:

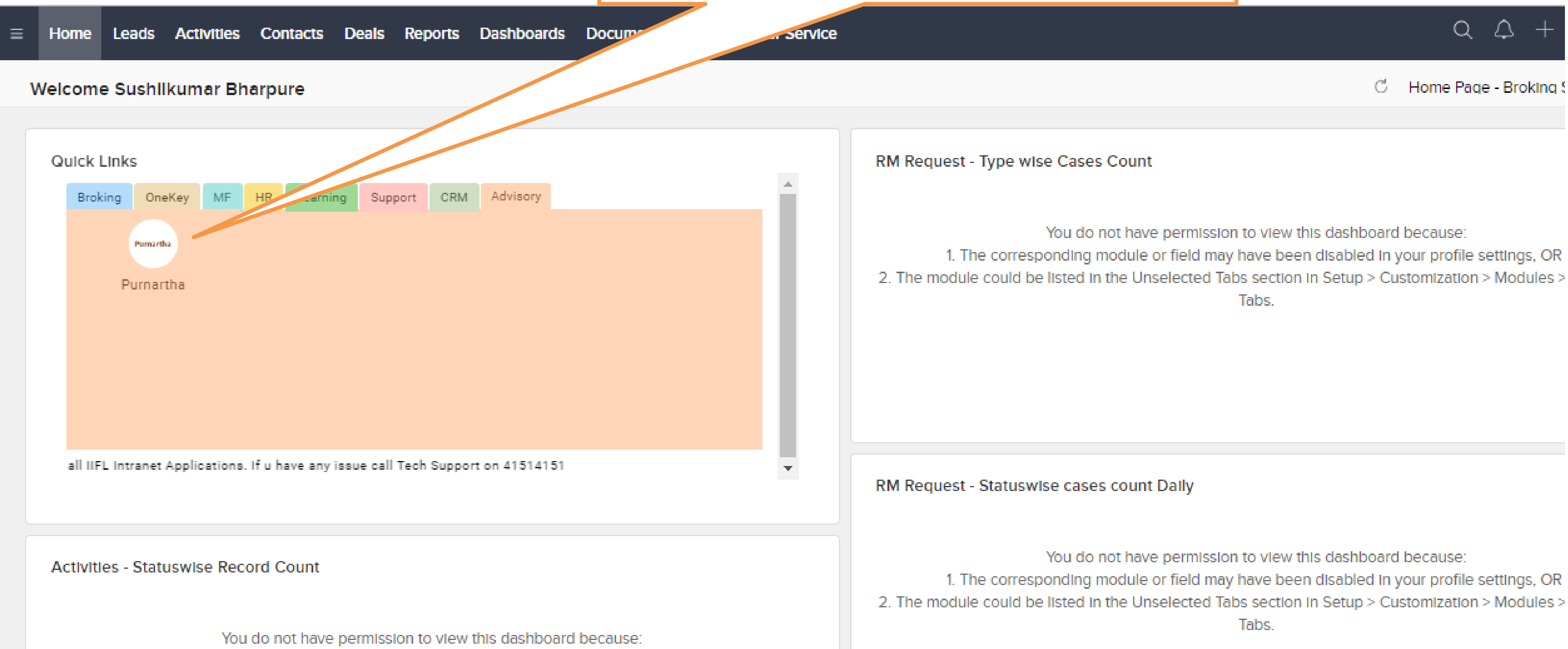
- Pl ensure that if discount/ deviation from existing plans is offered to client, the requisite discount coupon (Format is DS01234) is approved in the system. The same must be ready before RM / Client fills online sign up form.
- Also ensure that RM has correct email ID and mobile no, while filling online sign up form for NEW CLIENT. Email/ Mobile no can't be changed easily, if client rejects the sign up form filled by RM.

Process: A
New AUM Onboarding: NEW CLIENT

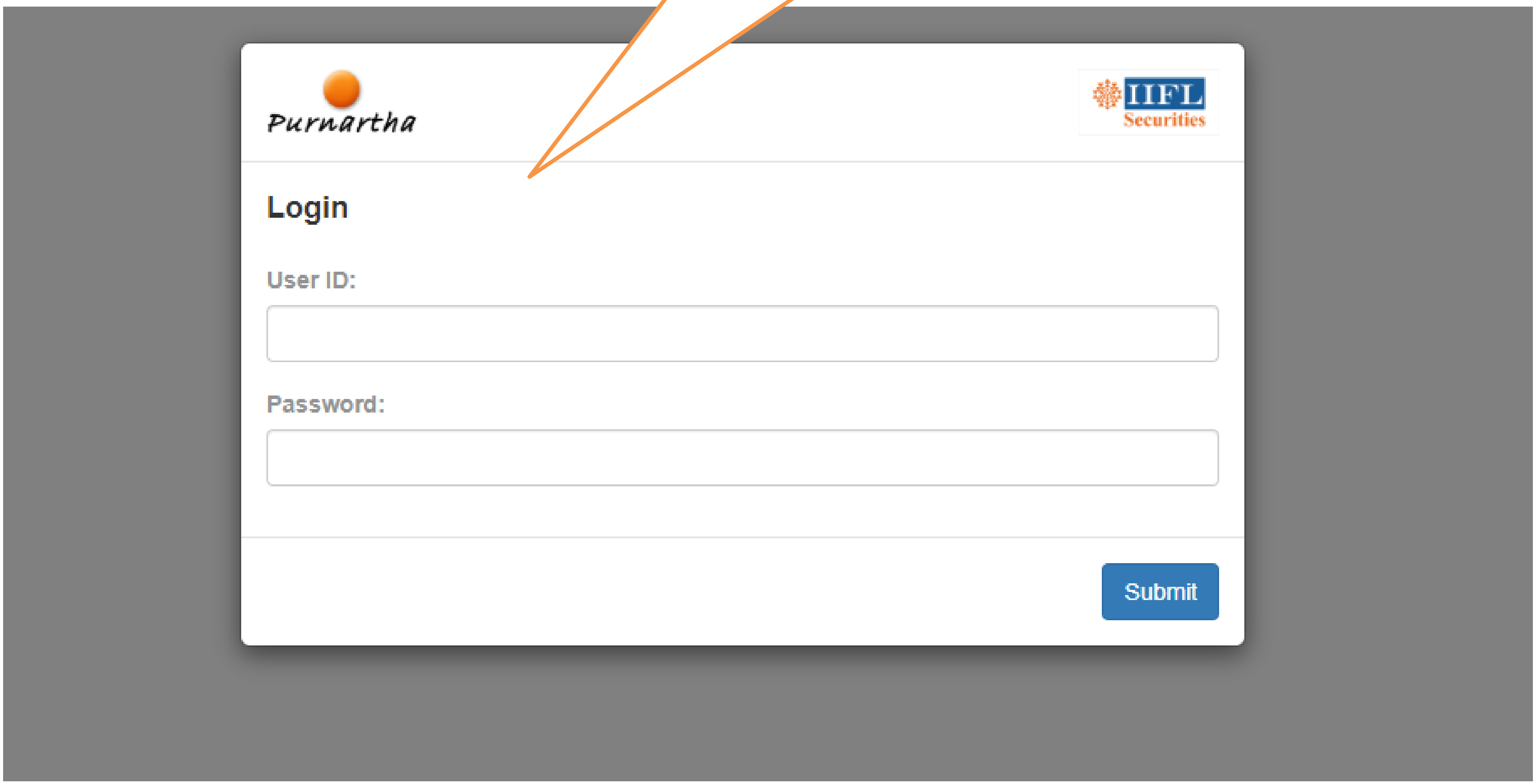


New Client - New AUM

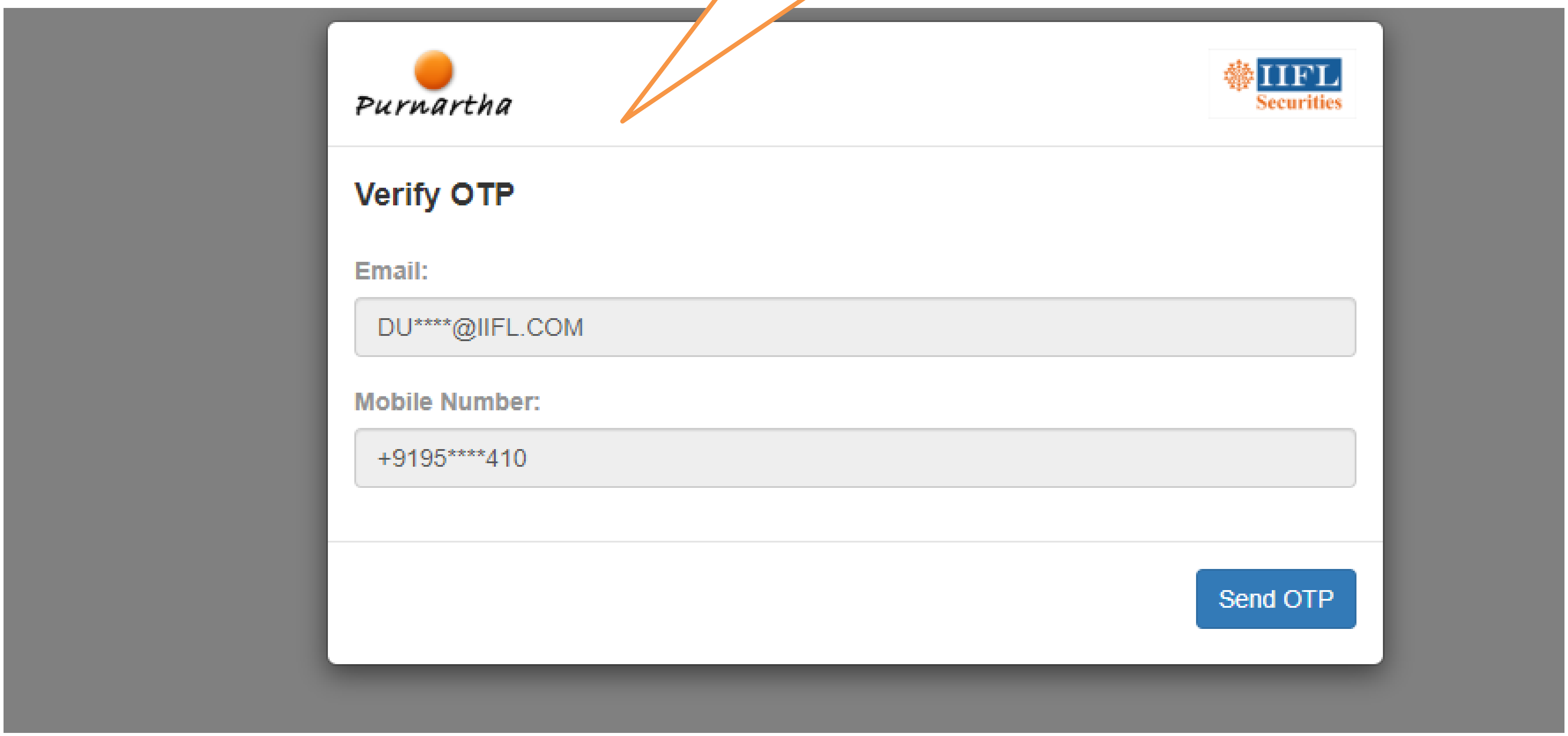
1. Visit Zoho CRM home Page
2. Open “Advisory Tab” in “Quick Links”
3. Click on “Purnartha” to start the process

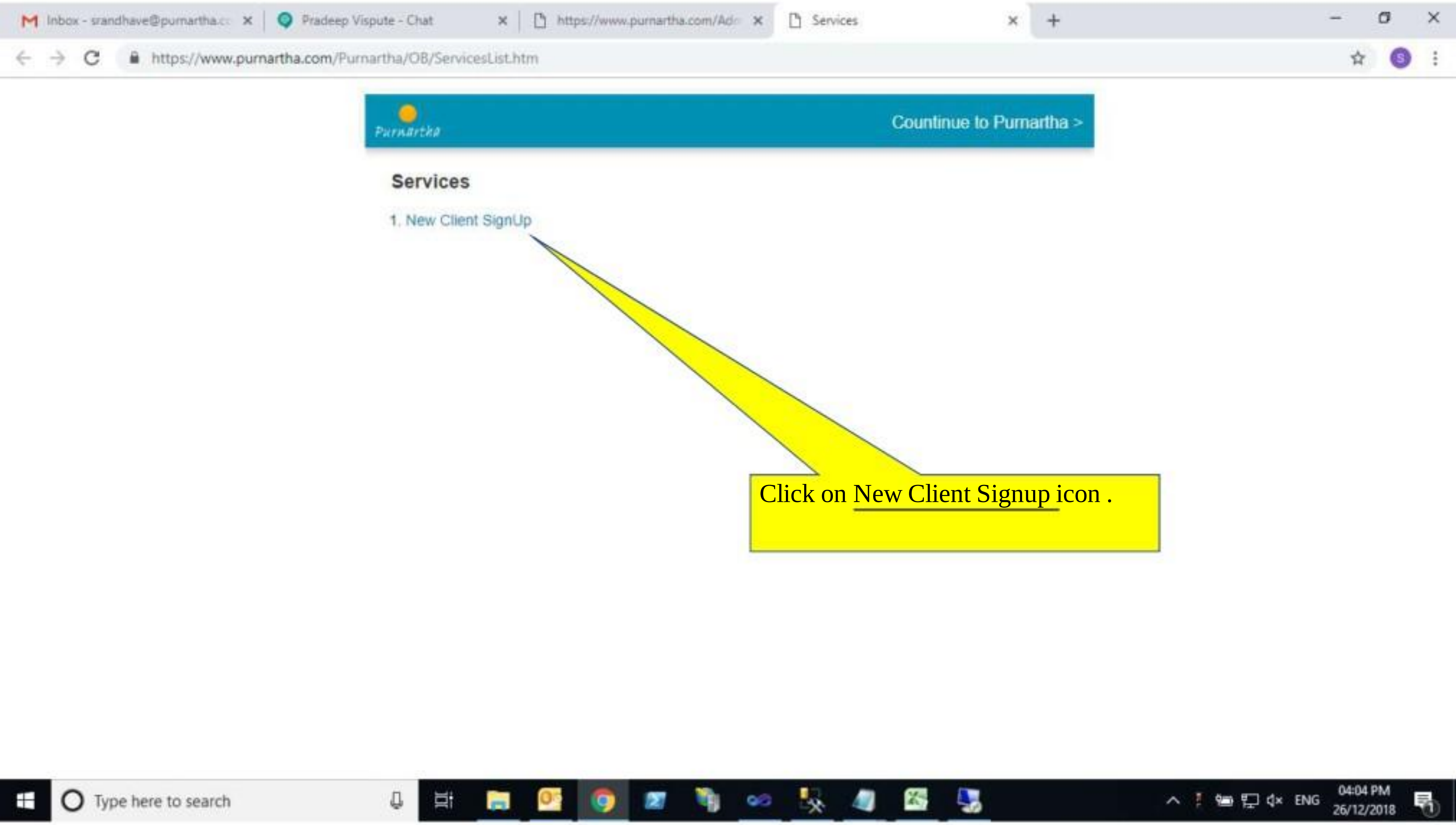


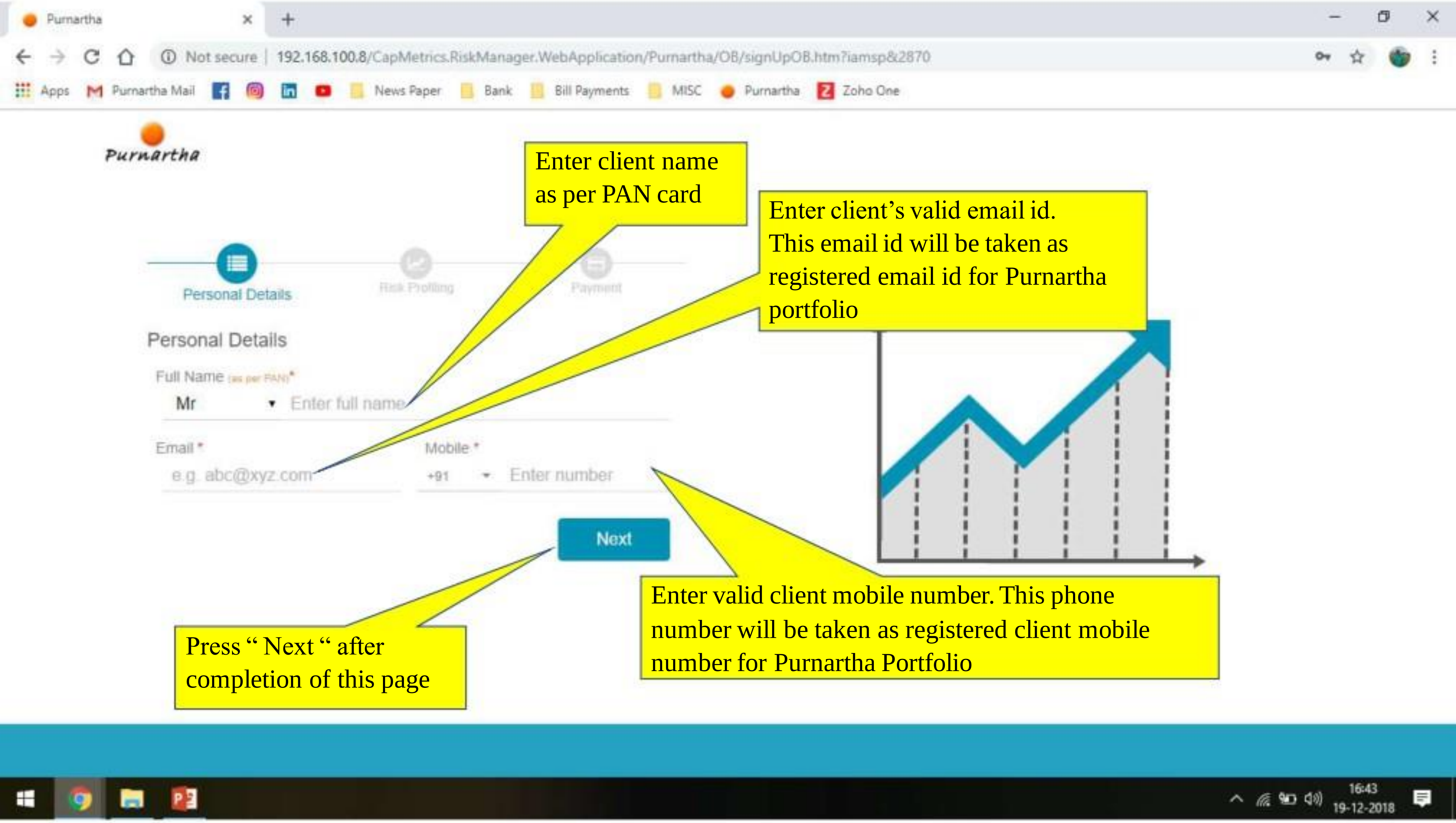
1. Enter you email ID as User ID
2. Enter same email ID as your password

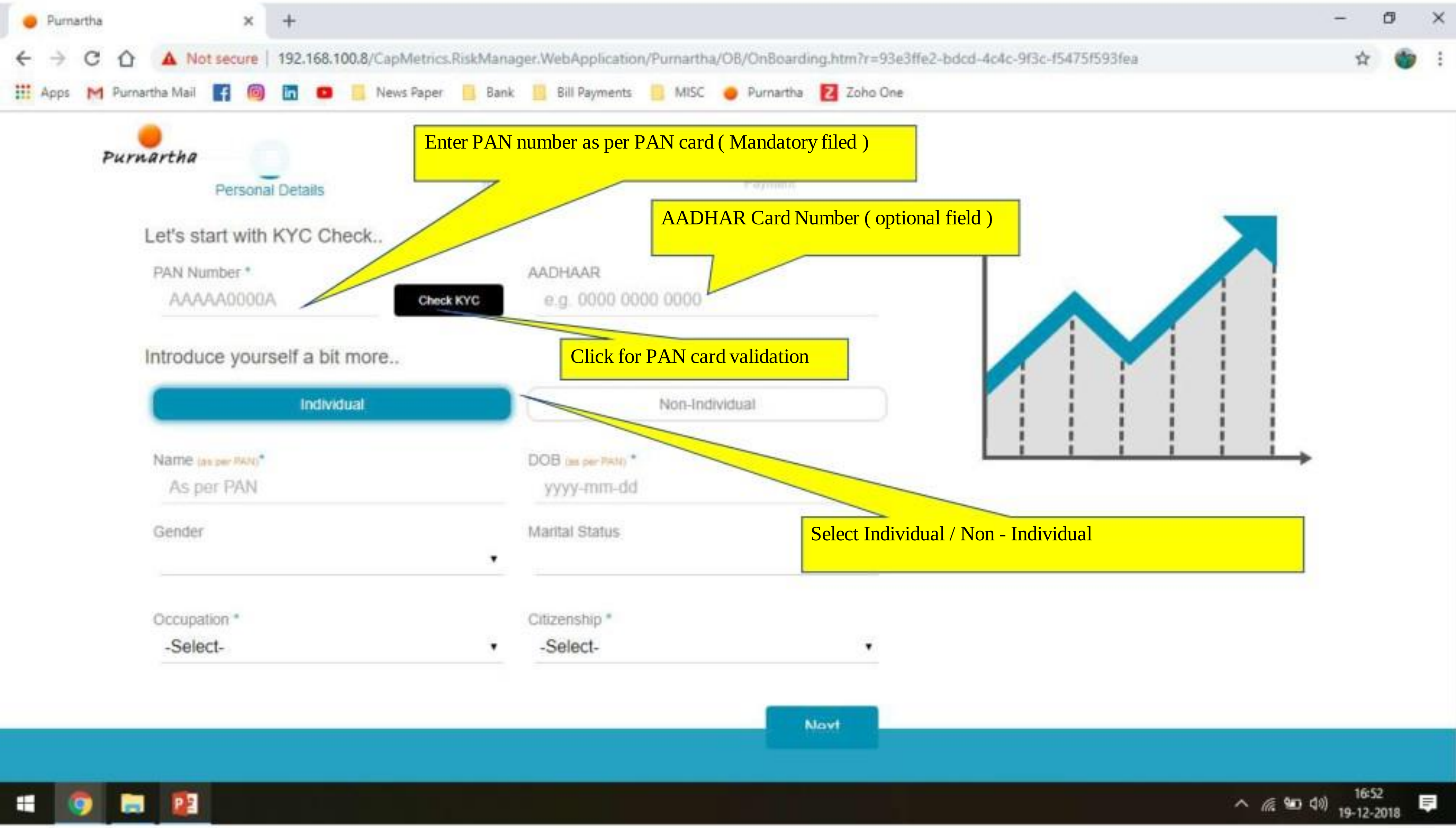


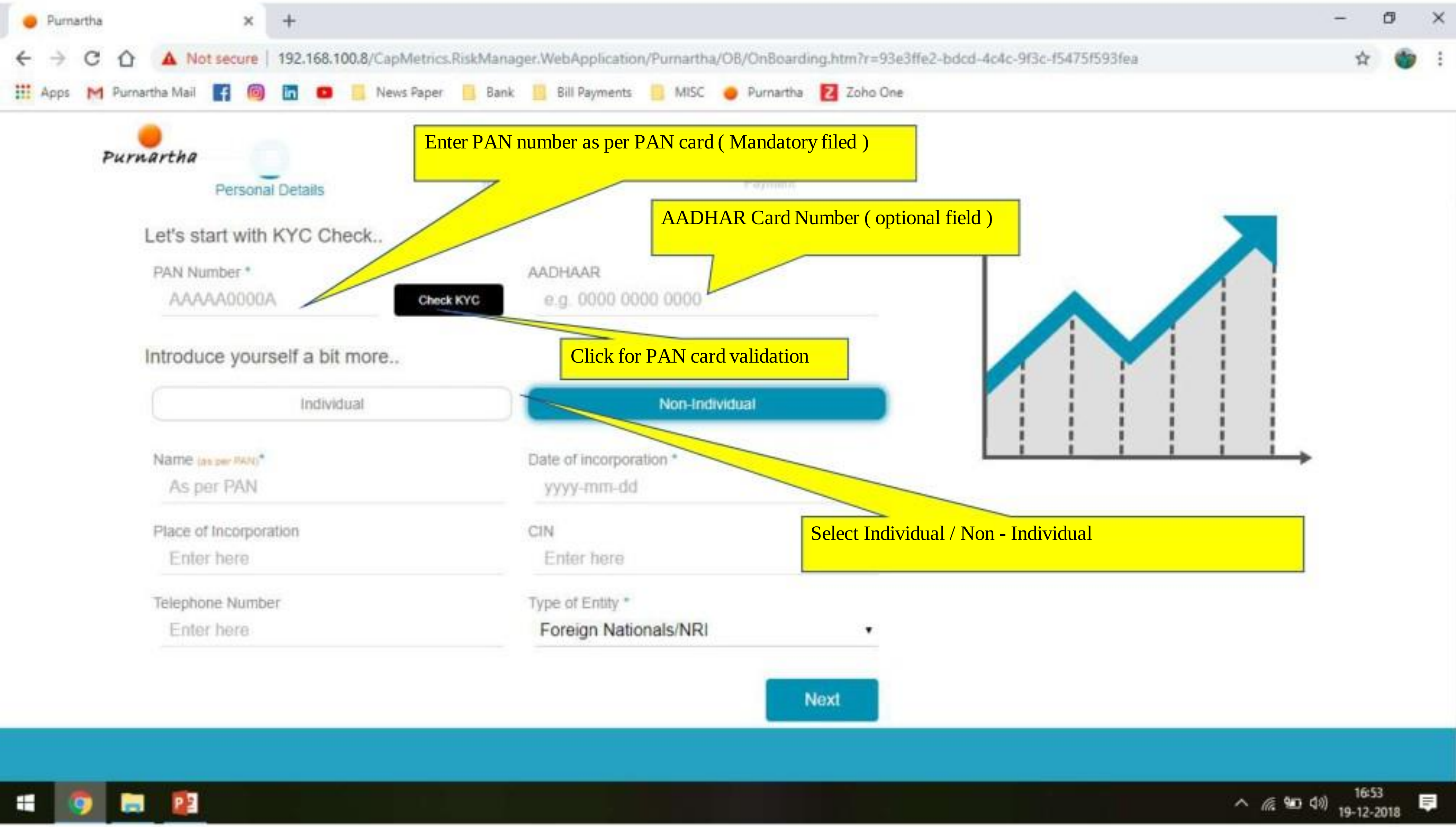
1. Click on Send OTP
2. Enter OTP received on your mobile no.




Inbox - srandhave@purnartha.c
Pradeep Vispute - Chat
https://www.purnartha.com/Ad
Services
https://www.purnartha.com/Purnartha/OB/ServicesList.htm
Purnartha
Countinue to Purnartha >
Services
1. New Client SignUp
Click on New Client Signup icon .
Type here to search
ENG
04:04 PM
26/12/2018


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/signUpOB.htm?iamsp&2870
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Enter client name as per PAN card
Enter client's valid email id. This email id will be taken as registered email id for Purnartha portfolio
Personal Details
Risk Profiling
Payment
Personal Details
Full Name (as per PAN)*
Mr
Enter full name
Email *
e.g. abc@xyz.com
Mobile *
+91
Enter number
Next
Press " Next " after completion of this page
Enter valid client mobile number. This phone number will be taken as registered client mobile number for Purnartha Portfolio
16:43
19-12-2018


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Enter PAN number as per PAN card (Mandatory filed)
AADHAR Card Number (optional field)
Let's start with KYC Check..
PAN Number *
AAAAA0000A
Check KYC
AADHAAR
e.g. 0000 0000 0000
Click for PAN card validation
Introduce yourself a bit more..
Individual
Non-Individual
Name (as per PAN)*
As per PAN
DOB (as per PAN) *
yyyy-mm-dd
Gender
Marital Status
Select Individual / Non - Individual
Occupation *
-Select-
Citizenship *
-Select-
Next
16:52
19-12-2018



Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Enter PAN number as per PAN card (Mandatory filed)
AADHAR Card Number (optional field)
Let's start with KYC Check..
PAN Number *
AAAAA0000A
Check KYC
AADHAAR
e.g. 0000 0000 0000
Click for PAN card validation
Introduce yourself a bit more..
Individual
Non-Individual
Name (as per PAN)*
As per PAN
Date of incorporation *
yyyy-mm-dd
Select Individual / Non - Individual
Place of Incorporation
Enter here
CIN
Enter here
Telephone Number
Enter here
Type of Entity *
Foreign Nationals/NRI
Next
16:53
19-12-2018

Purnartha

Enter client’s communication address as per PAN/ Aadhar (All Mandatory fields)

Personal Details | Risk Profiling | Payment

Address Details

Address (As per PAN/ Aadhar) *

permanent address

Location, Street, City *

e.g. Pune, Maharashtra, India

City *

e.g. Pune

State *

e.g. Maharashtra

Country *

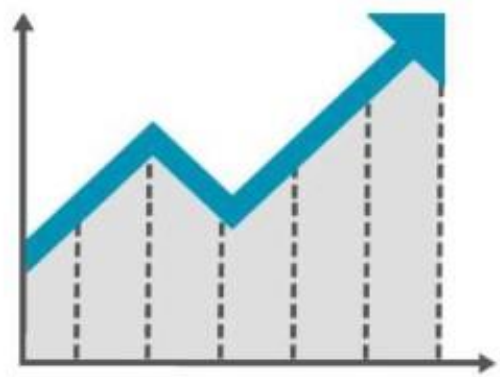
e.g. India

Pin Code *

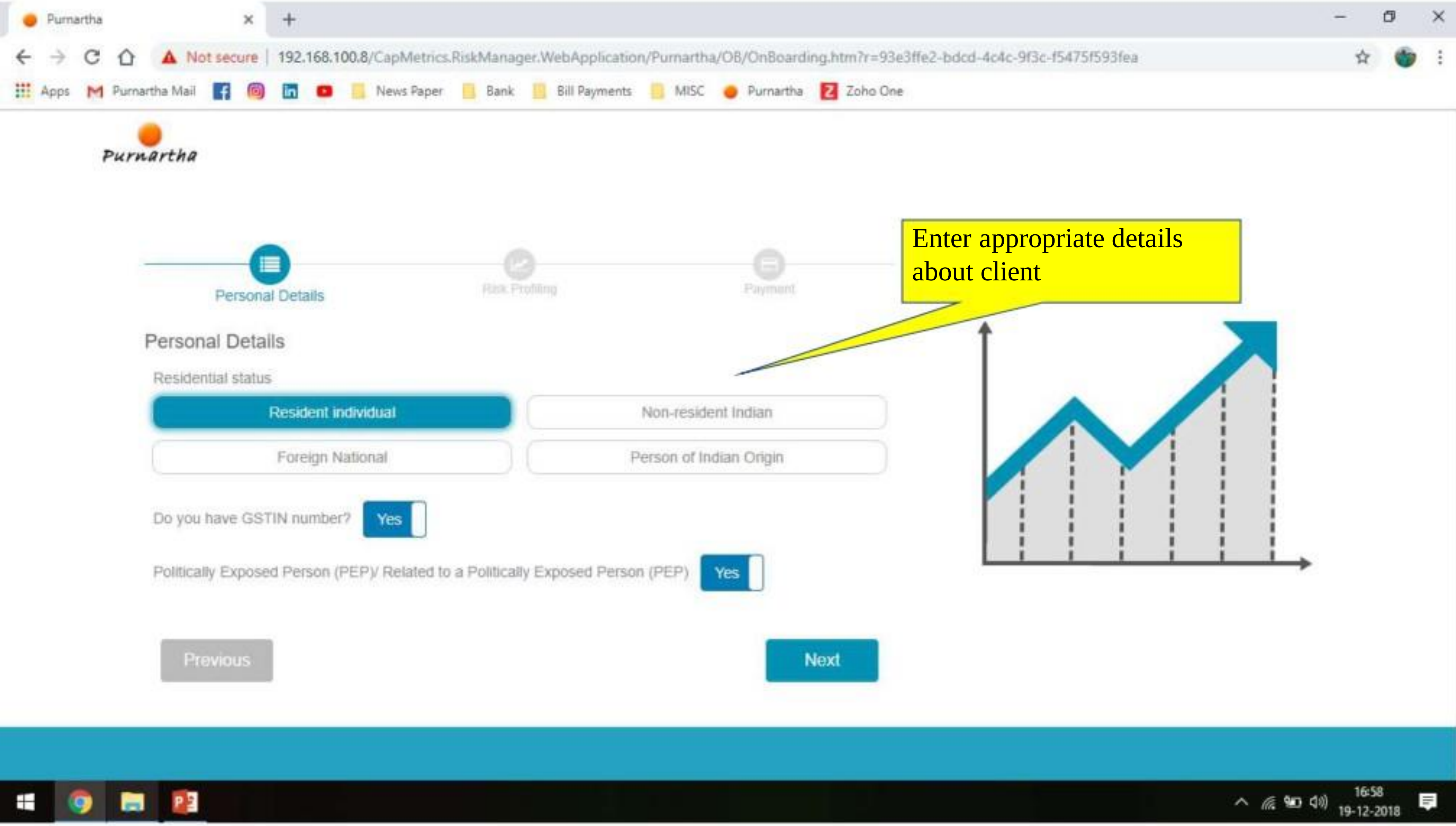
e.g. 411 004

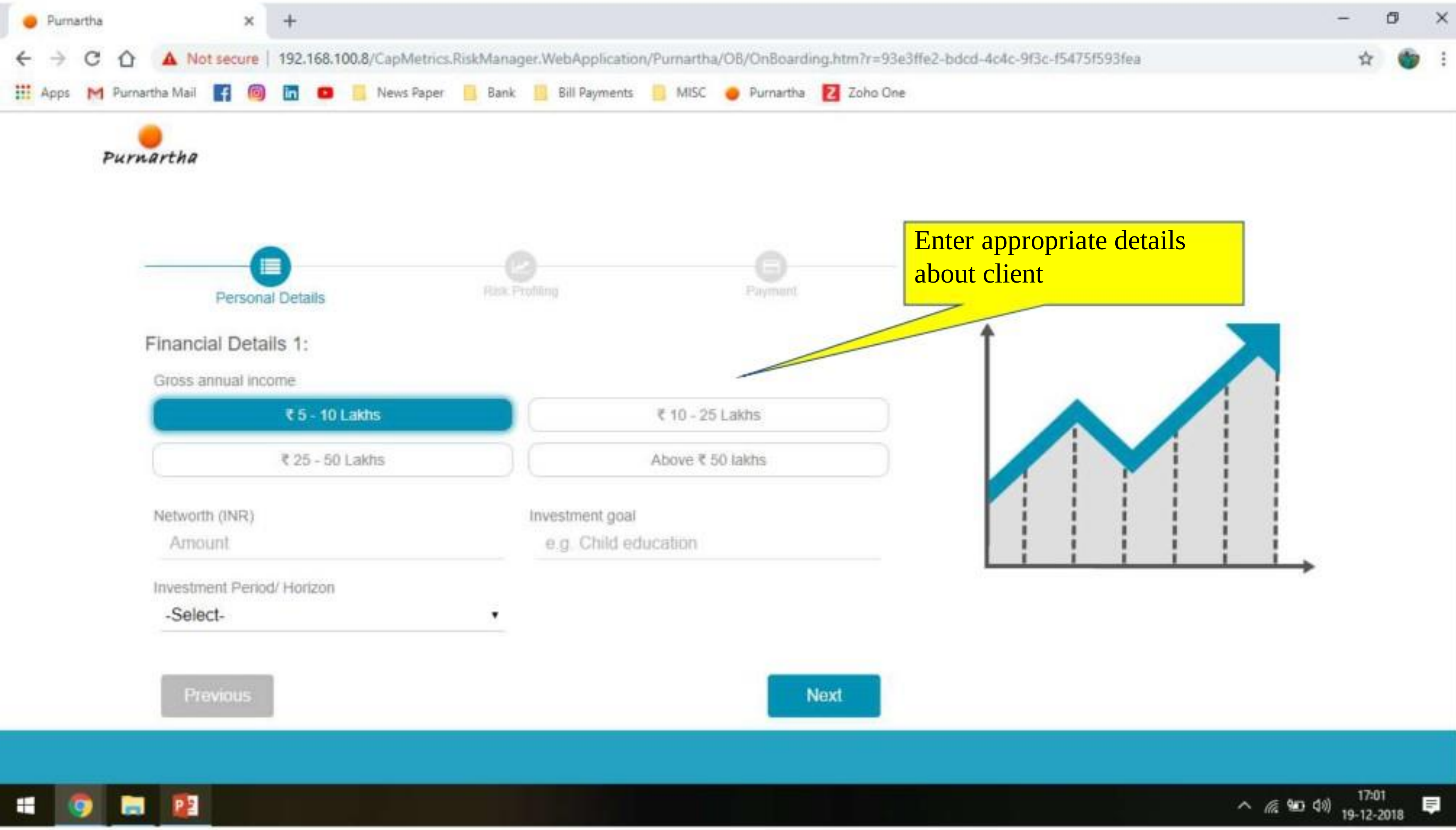
Previous

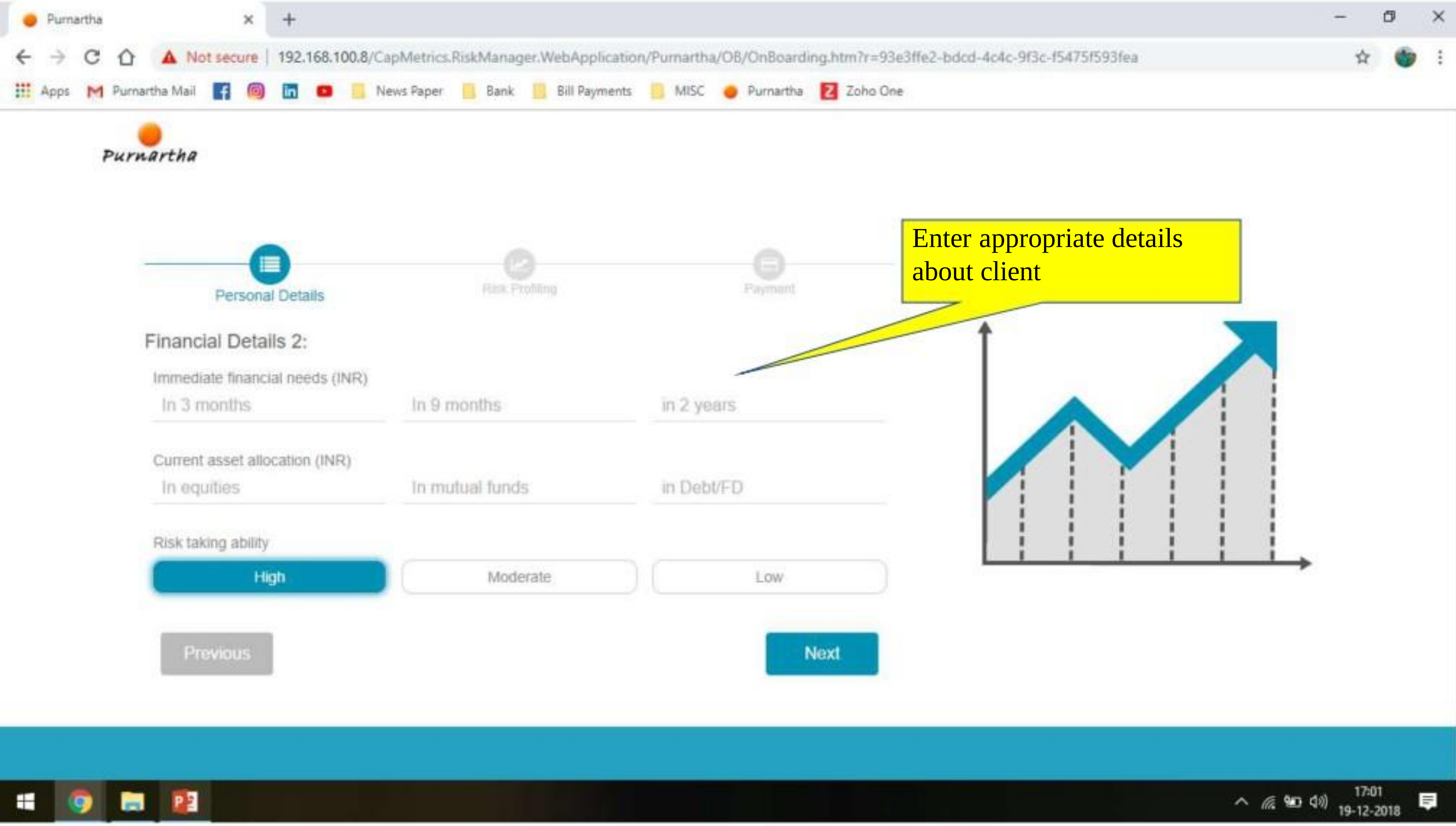
Next



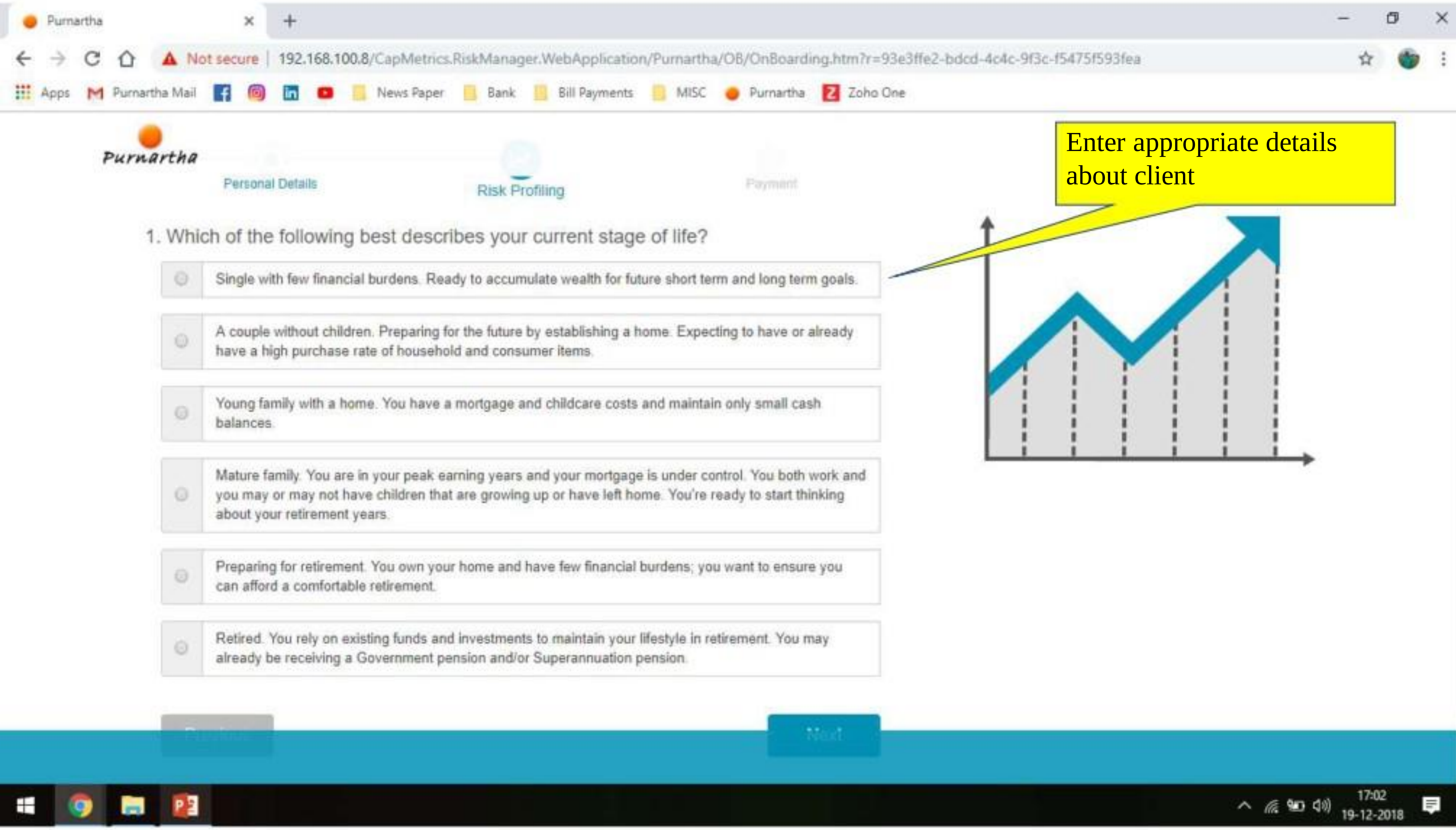
Enter appropriate details about client



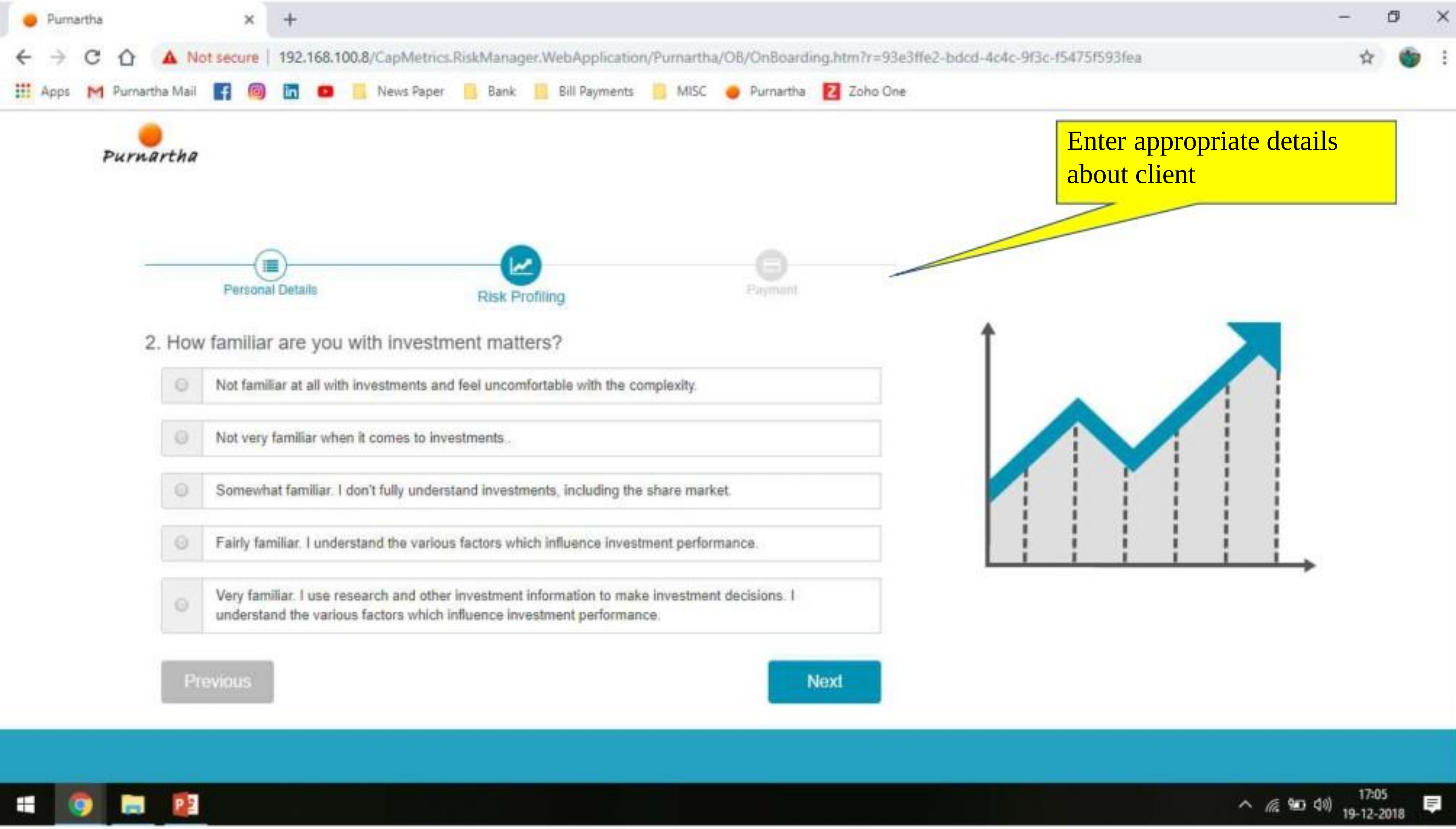

Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Enter appropriate details about client
Personal Details
Risk Profiling
Payment
Financial Details 1:
Gross annual income
₹ 5 - 10 Lakhs
₹ 10 - 25 Lakhs
₹ 25 - 50 Lakhs
Above ₹ 50 lakhs
Networth (INR)
Amount
Investment goal
e.g. Child education
Investment Period/ Horizon
-Select-
Previous
Next
17:01
19-12-2018

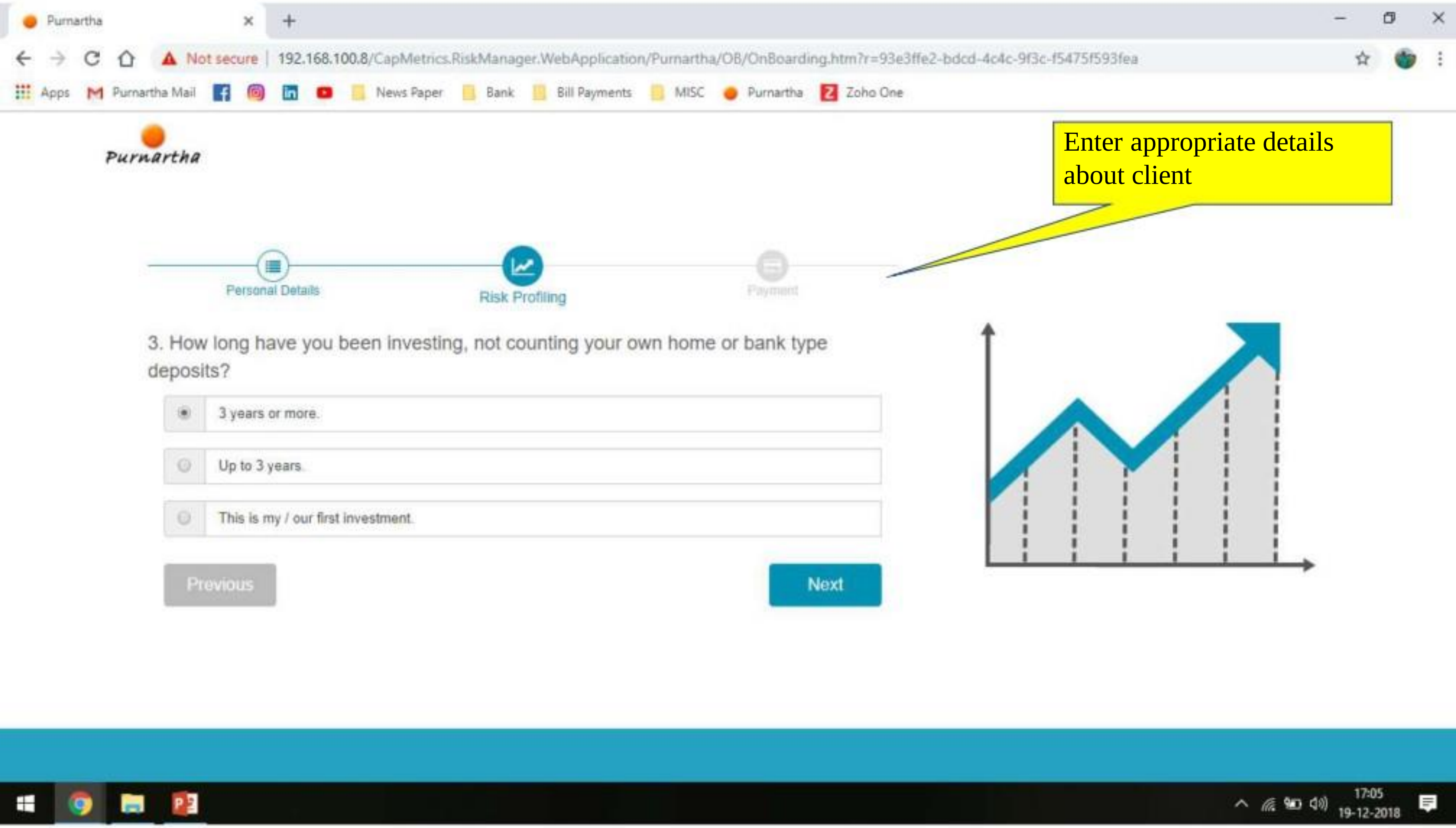

Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Enter appropriate details about client
Personal Details
Risk Profiling
Payment
Financial Details 2:
Immediate financial needs (INR)
In 3 months
In 9 months
in 2 years
Current asset allocation (INR)
In equities
In mutual funds
in Debt/FD
Risk taking ability
High
Moderate
Low
Previous
Next
17:01
19-12-2018

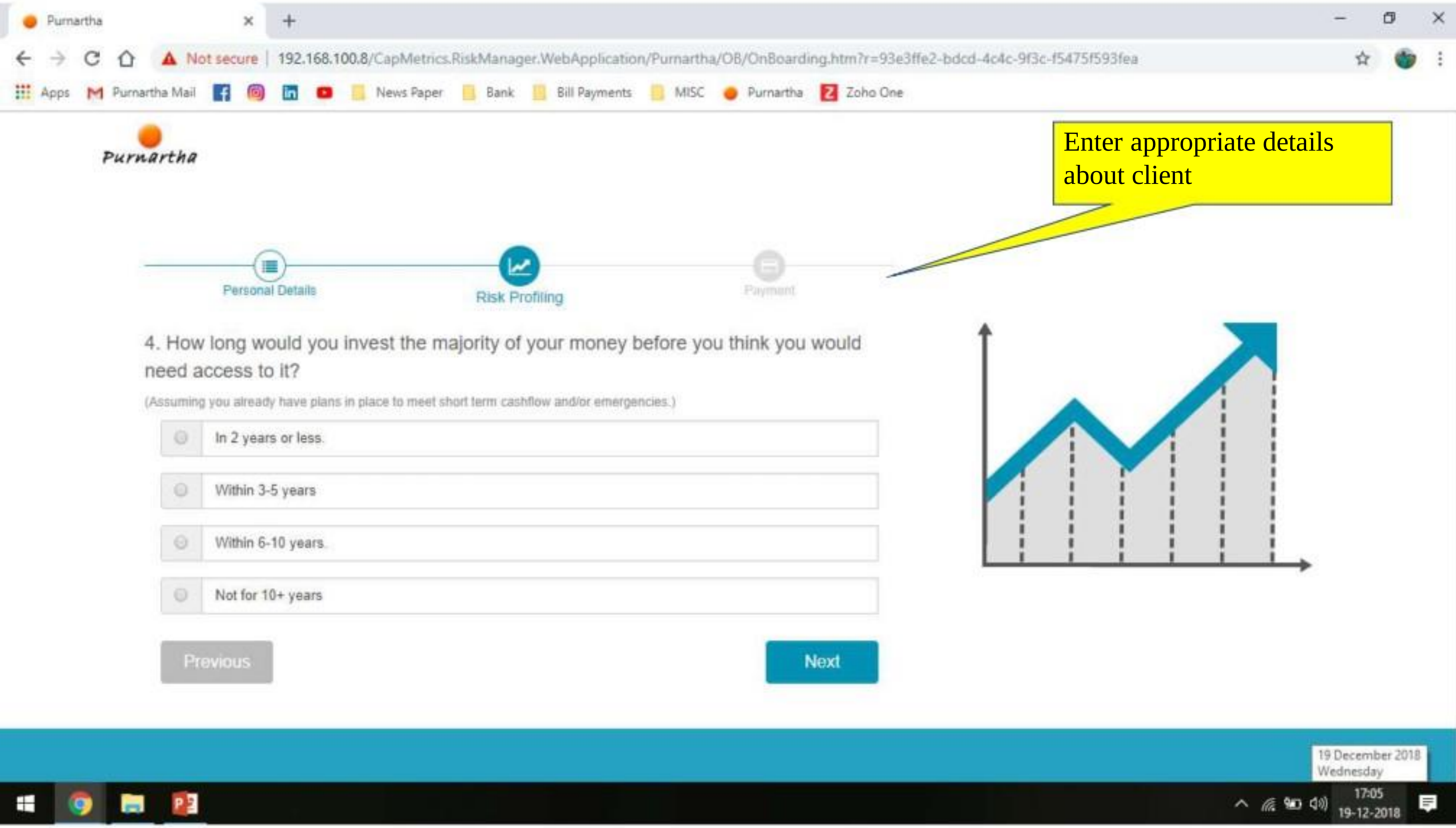
Enter appropriate details about client



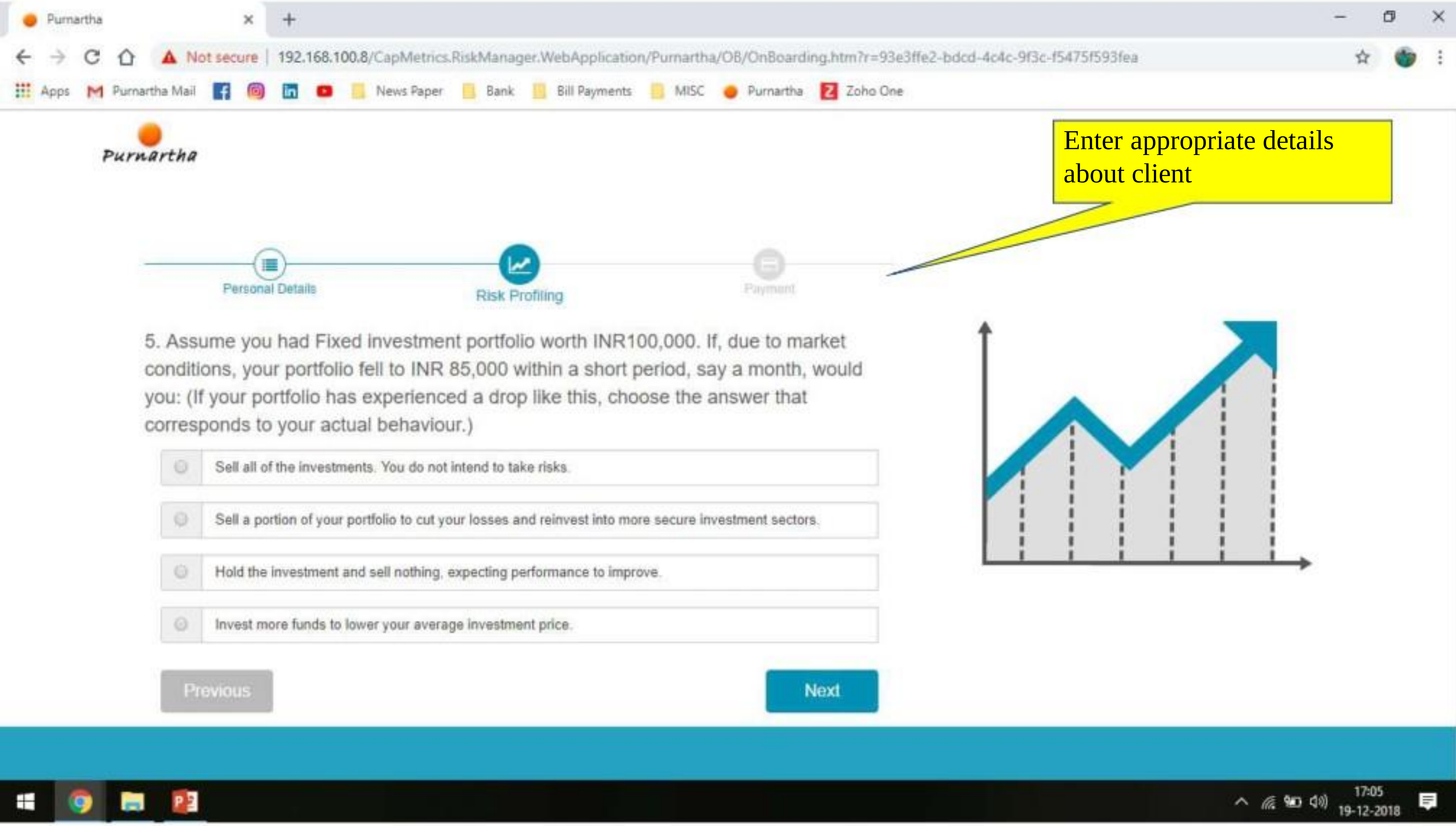
Enter appropriate details about client

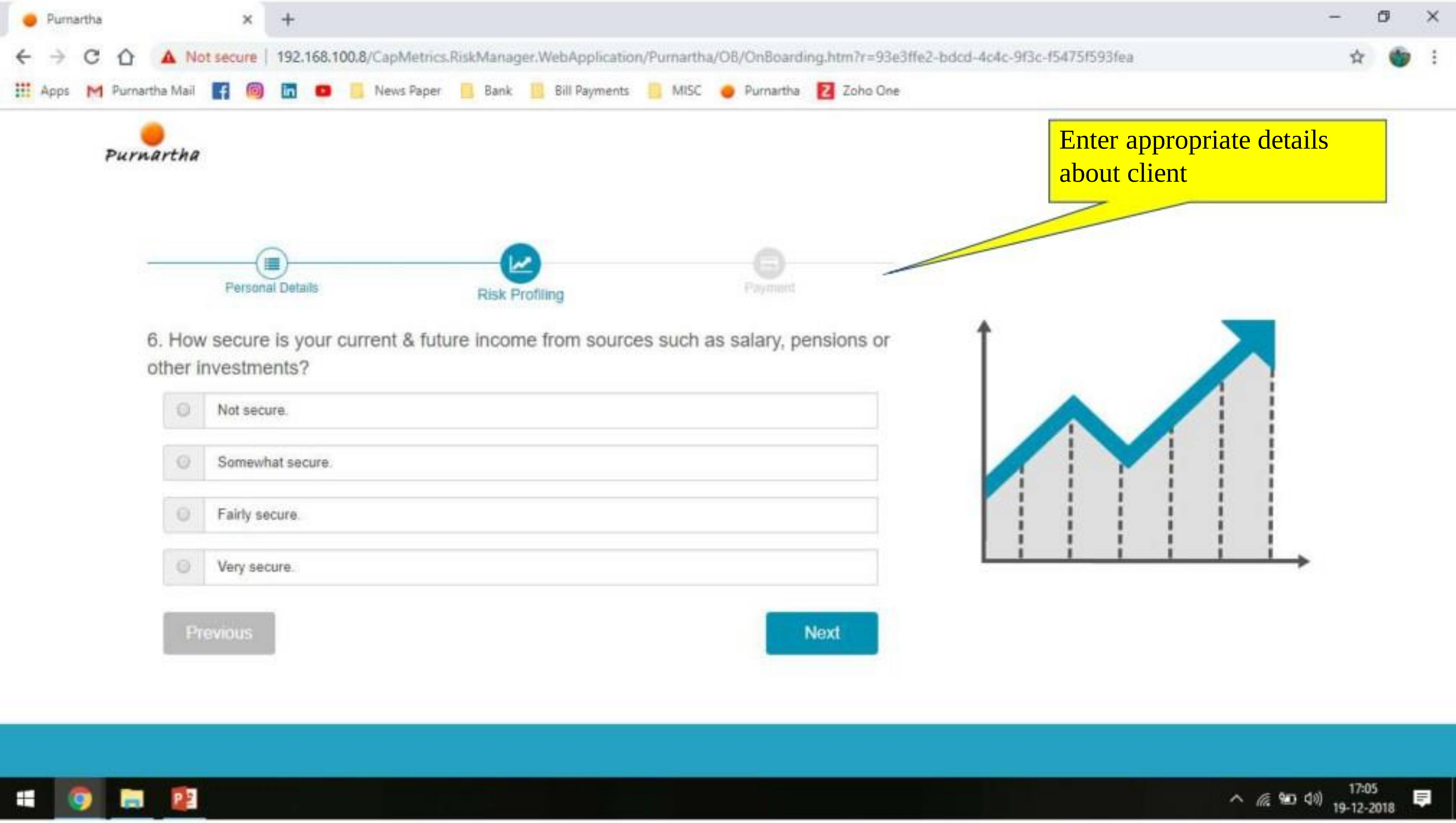



Enter appropriate details about client
Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Risk Profiling
Payment
3. How long have you been investing, not counting your own home or bank type deposits?
3 years or more.
Up to 3 years.
This is my / our first investment.
Previous
Next
17:05
19-12-2018

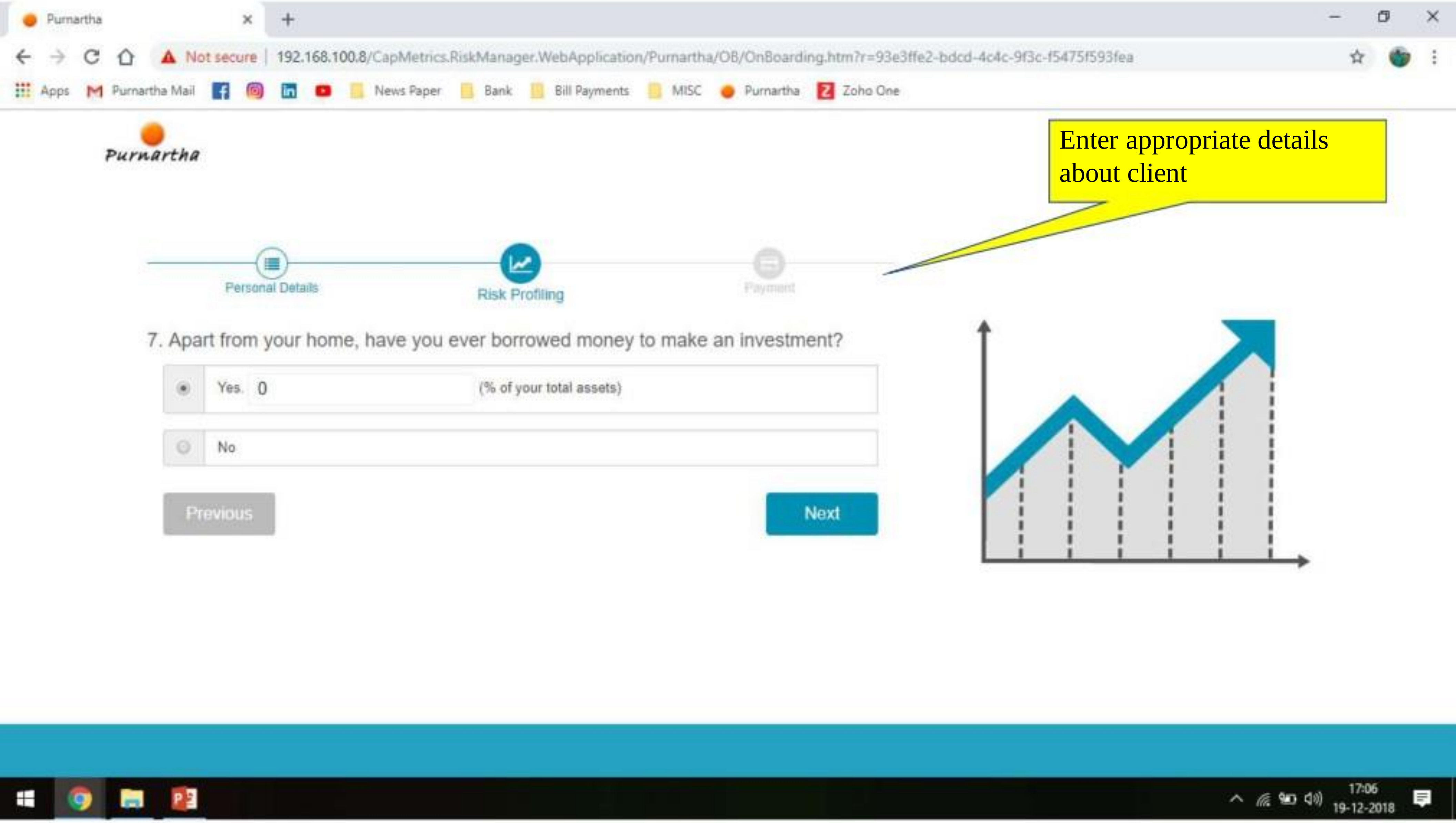

Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Enter appropriate details about client
Purnartha
Personal Details
Risk Profiling
Payment
4. How long would you invest the majority of your money before you think you would need access to it?
(Assuming you already have plans in place to meet short term cashflow and/or emergencies.)
In 2 years or less.
Within 3-5 years
Within 6-10 years.
Not for 10+ years
Previous
Next
19 December 2018
Wednesday
17:05
19-12-2018

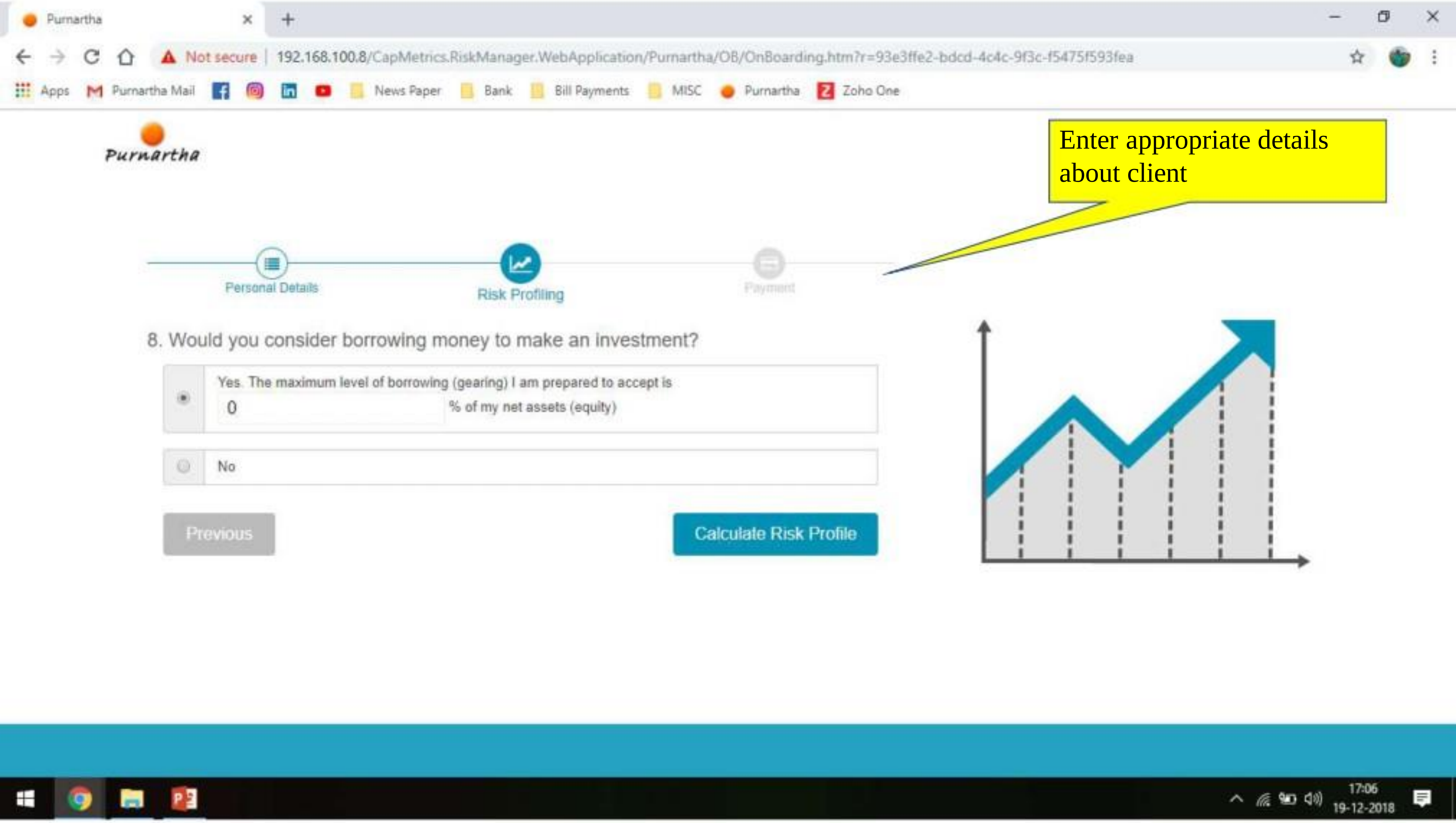
Enter appropriate details about client

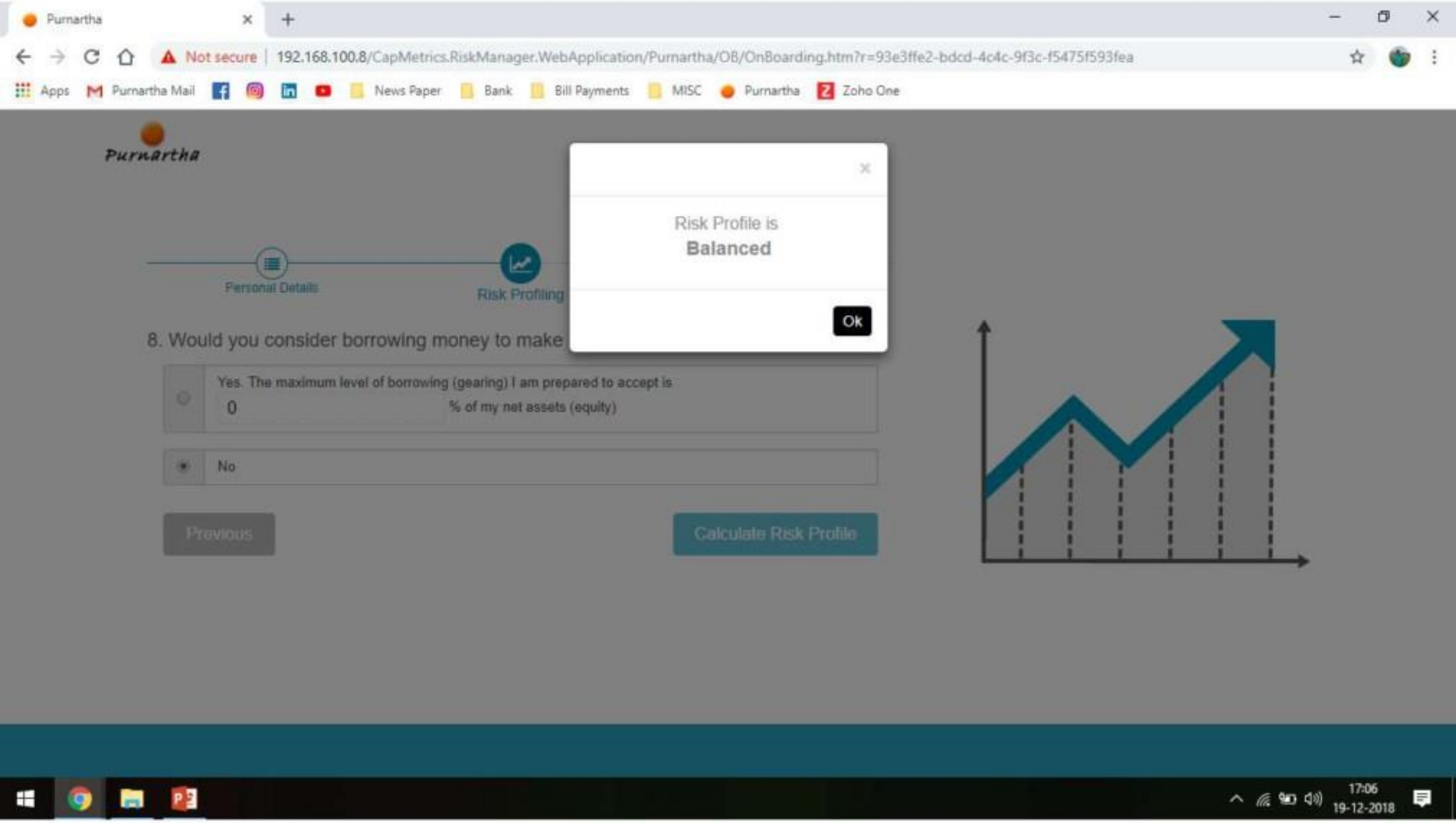



Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps Purnartha Mail News Paper Bank Bill Payments MISC Purnartha Zoho One
Purnartha
Enter appropriate details about client
Personal Details
Risk Profiling
Payment
6. How secure is your current & future income from sources such as salary, pensions or other investments?
Not secure.
Somewhat secure.
Fairly secure.
Very secure.
Previous
Next
17:05
19-12-2018

Enter appropriate details about client




Enter appropriate details about client
Purnartha
Personal Details
Risk Profiling
Payment
8. Would you consider borrowing money to make an investment?
Yes. The maximum level of borrowing (gearing) I am prepared to accept is
0
% of my net assets (equity)
No
Previous
Calculate Risk Profile


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Risk Profiling
8. Would you consider borrowing money to make
Yes. The maximum level of borrowing (gearing) I am prepared to accept is
0
% of my net assets (equity)
No
Previous
Calculate Risk Profile
Risk Profile is
Balanced
Ok
17:06
19-12-2018

Purnartha ×

Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea

Apps Purnartha Mail News Paper Bank Bill Payments MISC Purnartha Zoho One

Purnartha

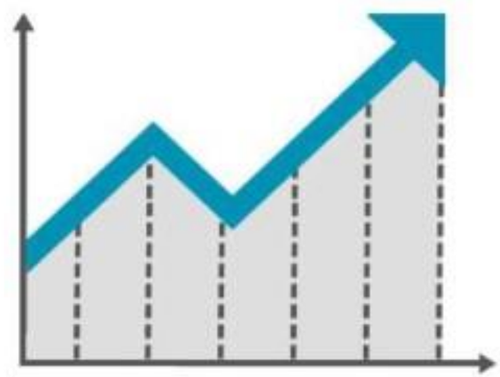
Enter appropriate details about client

Personal Details | Risk Profiling | Payment

Disclaimer:

I Client's Name hereby declare that

- [ ] I would not like to disclose my complete financial information to Purnartha. I understand that due to incomplete information provided, my risk profiling and investment advisory might not be in accordance with my actual risk taking ability
- [ ] I would like Purnartha to provide advice for only a part of my portfolio. I understand that, due to providing advice on my partial portfolio, my risk profiling and investment advisory might not be in accordance with my actual risk taking ability
- [ ] Based on the information provided to Purnartha, my risk profile is **Balanced**. Based on my risk profile, the asset allocation recommended by Purnartha is **60**% in equity, **40** % in debt, **0**% in cash. However, I would like to take an exception/ deviation from the recommended asset allocation and I hereby give my consent for an asset allocation of **100%** in equity, **0%** in debt, **0%** in cash. I understand that, due to change in asset allocation, my risk profiling and investment advisory might not be in accordance with my actual risk taking ability.
- [ ] I shall not hold Purnartha responsible for any direct or indirect losses due to non-disclosure of complete financial information by me and/ or partial disclosure of my portfolio by me and/ or recommendation of a revised asset allocation by Purnartha.



Next

17:08
19-12-2018

Purnartha

Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea

Apps | Purnartha Mail | News Paper | Bank | Bill Payments | MISC | Purnartha | Zoho One

Purnartha

Personal Details | Risk Profiling | Payment

Terms and Conditions:

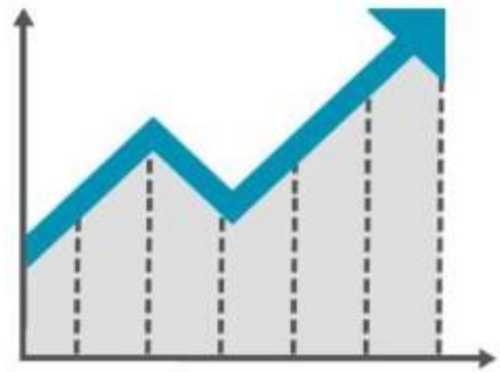
For the purpose of this document, "Purnartha" refers to Purnartha Investment Advisers Pvt. Ltd., a company incorporated under the Companies Act 1956, having its registered office at 33, Rachana, Ground & 2nd floor, Dr. Ketkar Road, Bharati Niwas Society, Off Karve Road, Erandwane, Pune - 411 004, Maharashtra shall be referred to as the "Purnartha" in the Terms and Conditions

1) Purnartha provides investment research with regards to securities. Purnartha has agreed to share this research with me and has registered itself with SEBI as an "Investment Advisor" under the SEBI (Investment Advisor) Regulations, 2013, bearing registration number INA000000672.

2) I have provided all the necessary KYC information and undertake to comply with the KYC requirements on a continuous basis as and when asked for.

3) Appointment of Advisor and Advisory fees

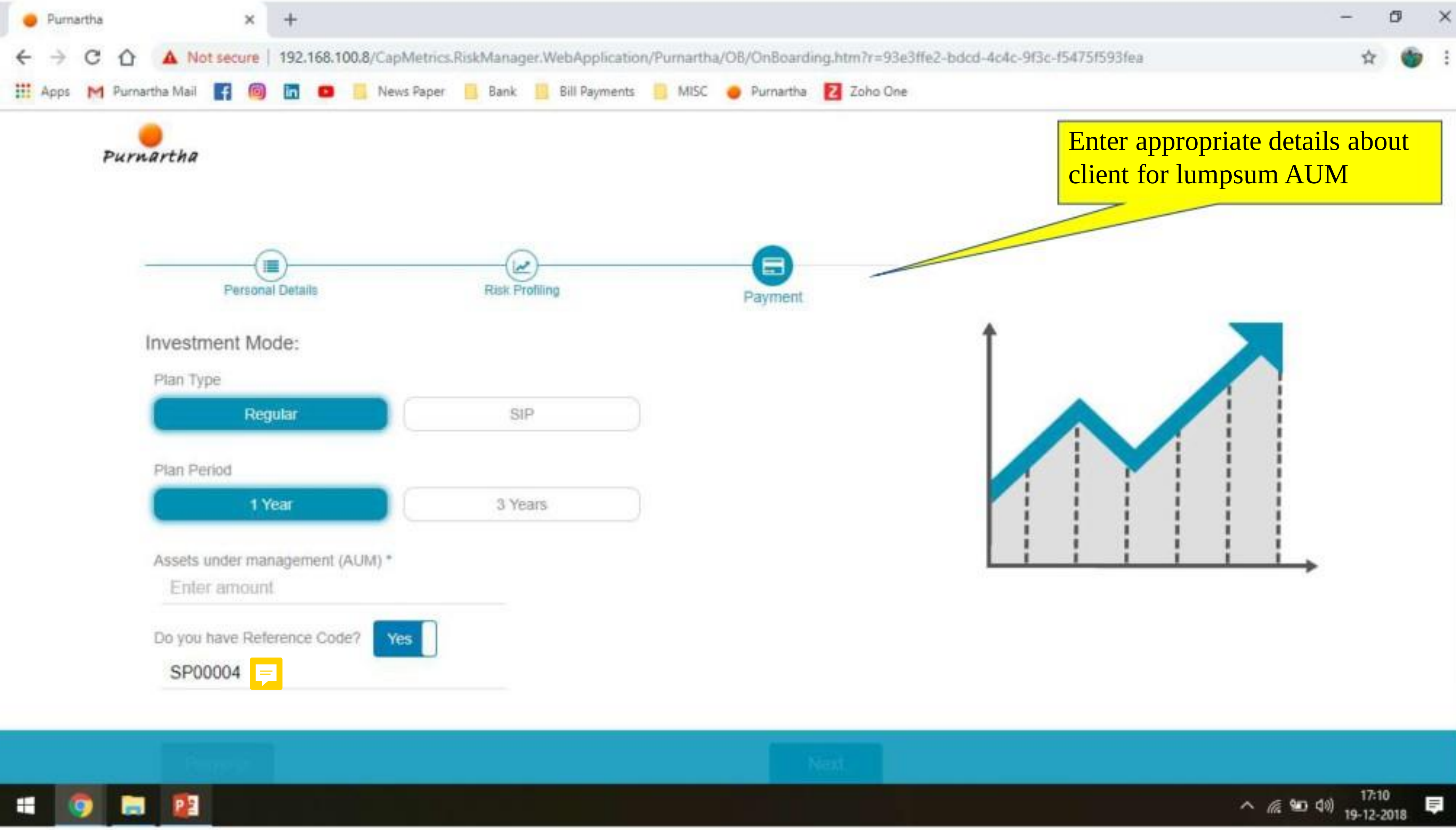
3.1) I hereby appoint Purnartha as my Advisor to provide Advisory Service. I have duly filled the required information online and affirm that I agreed to all the terms and conditions. I hereby agree that I have provided true and correct details and further agree that the terms and conditions presented hereafter are binding upon me and are legally enforceable. Filing and submitting of the

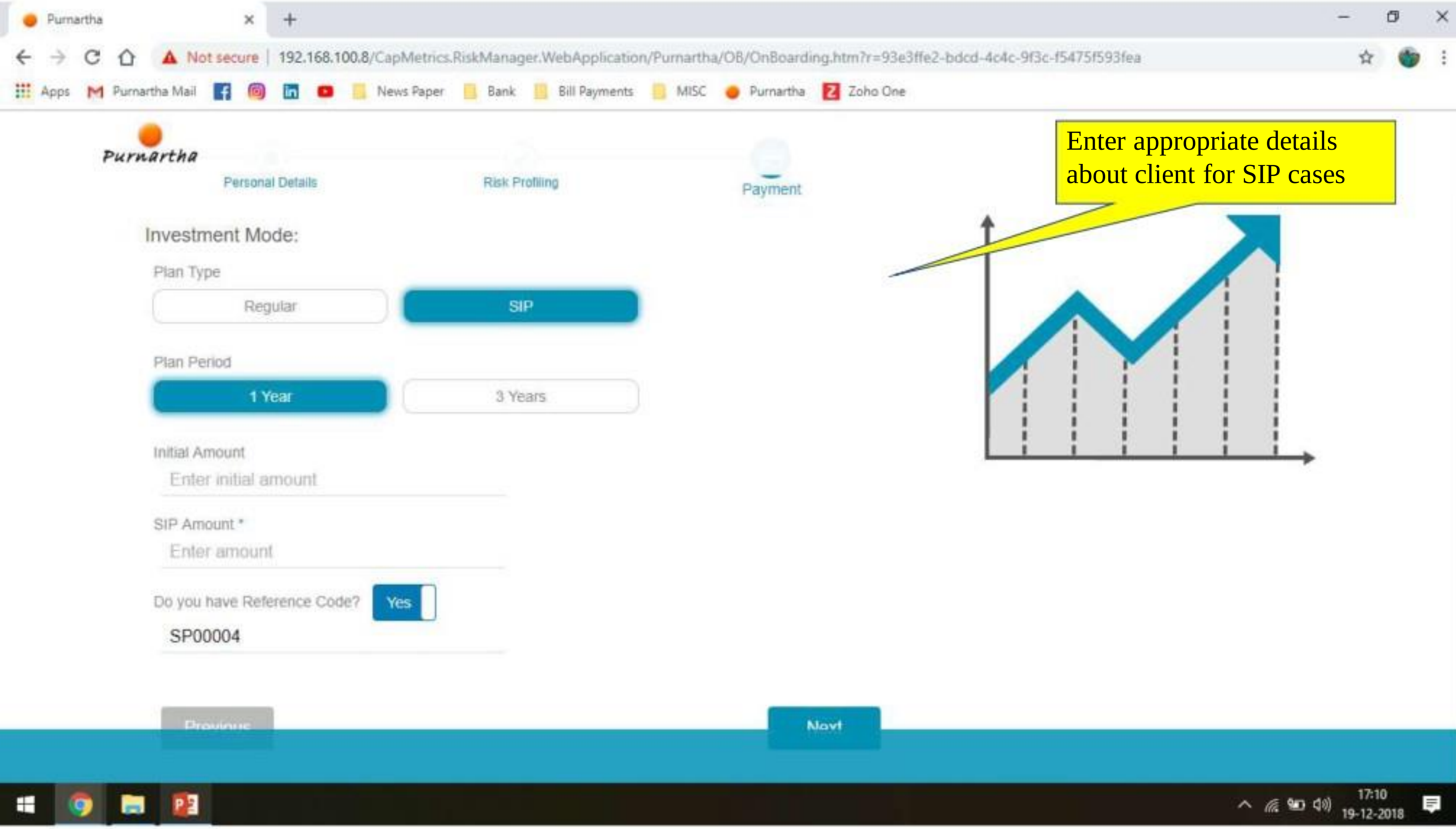


Previous | Next

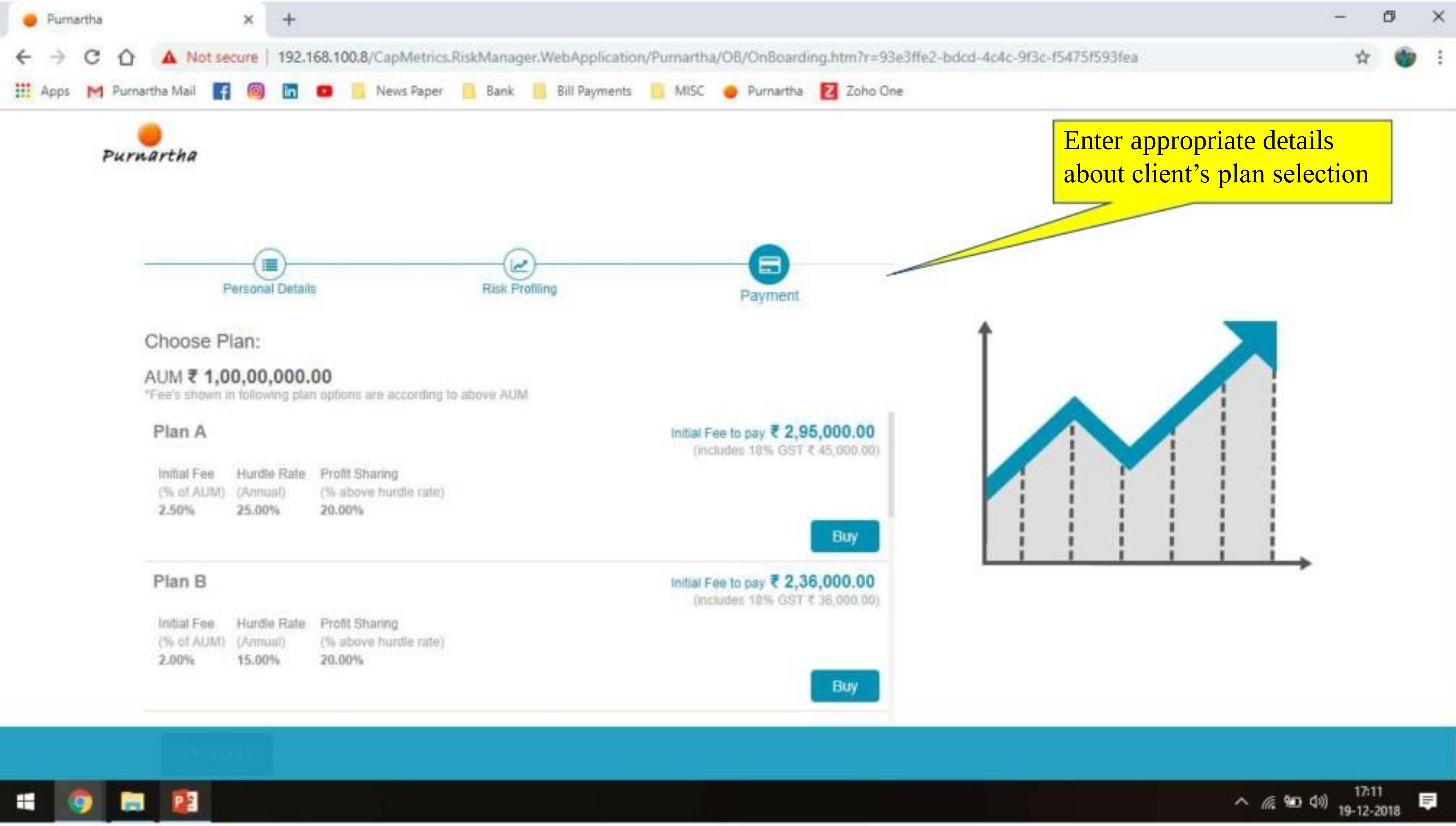
17:10
19-12-2018

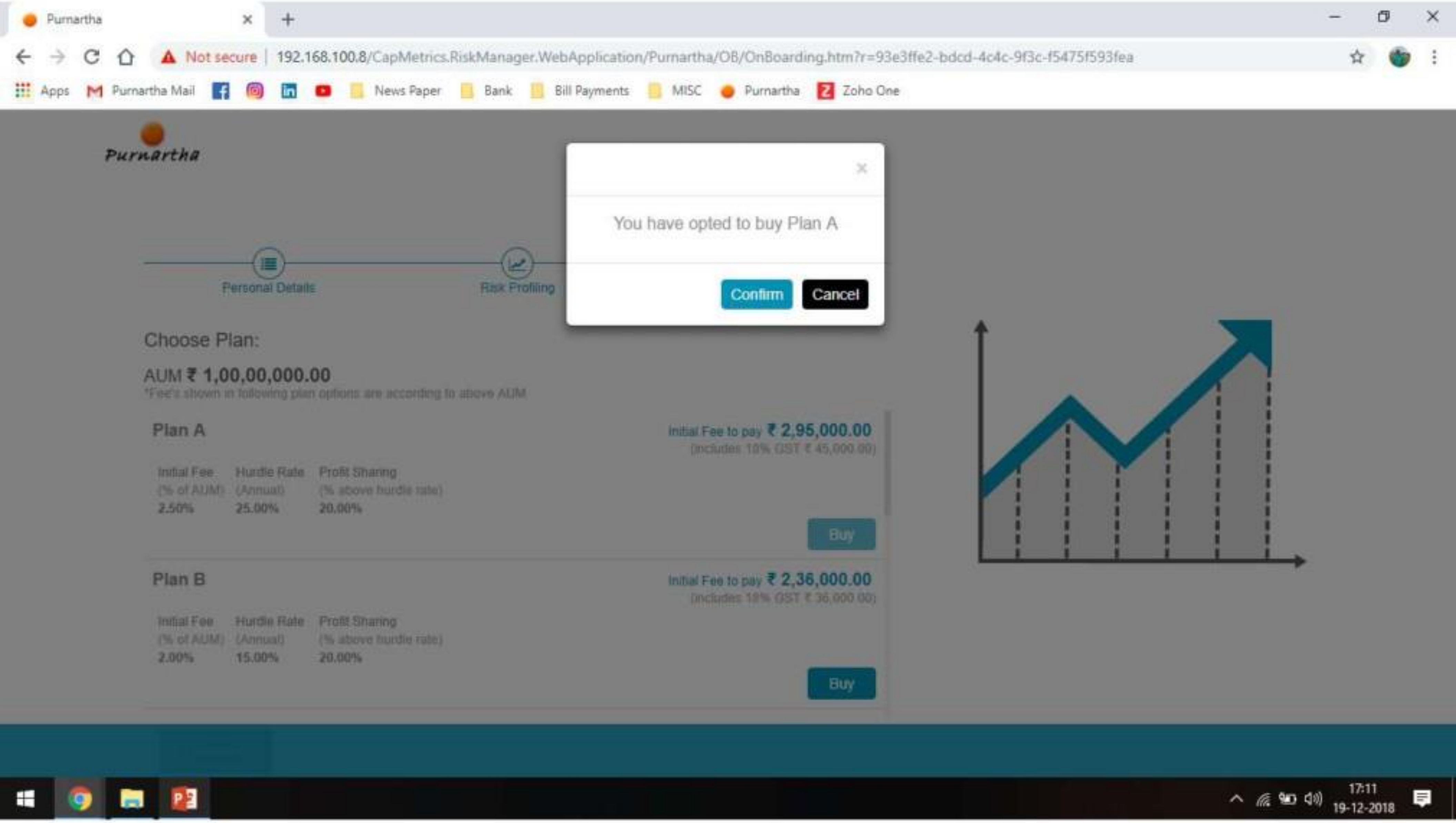
Enter appropriate details about client for lumpsum AUM



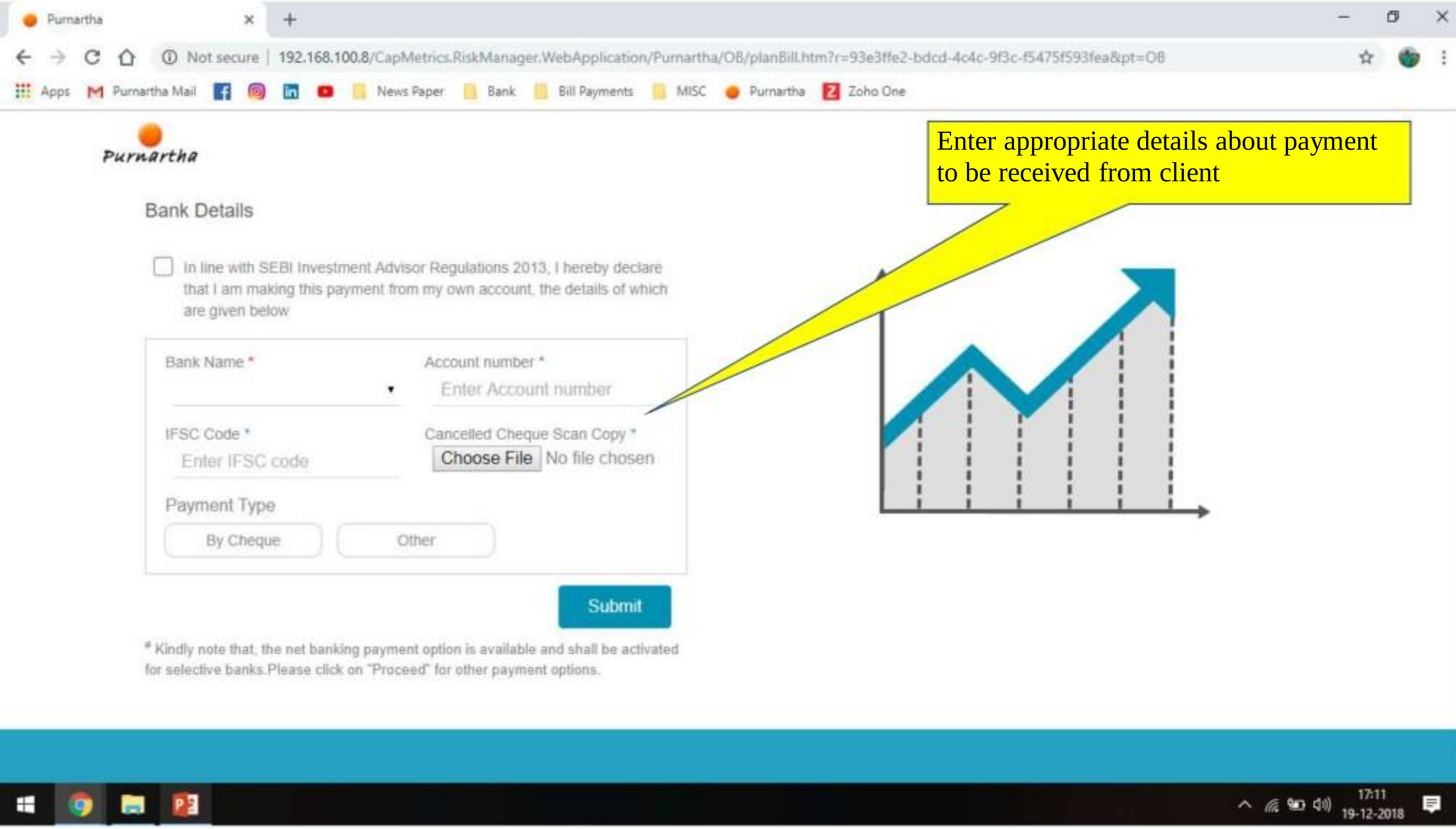


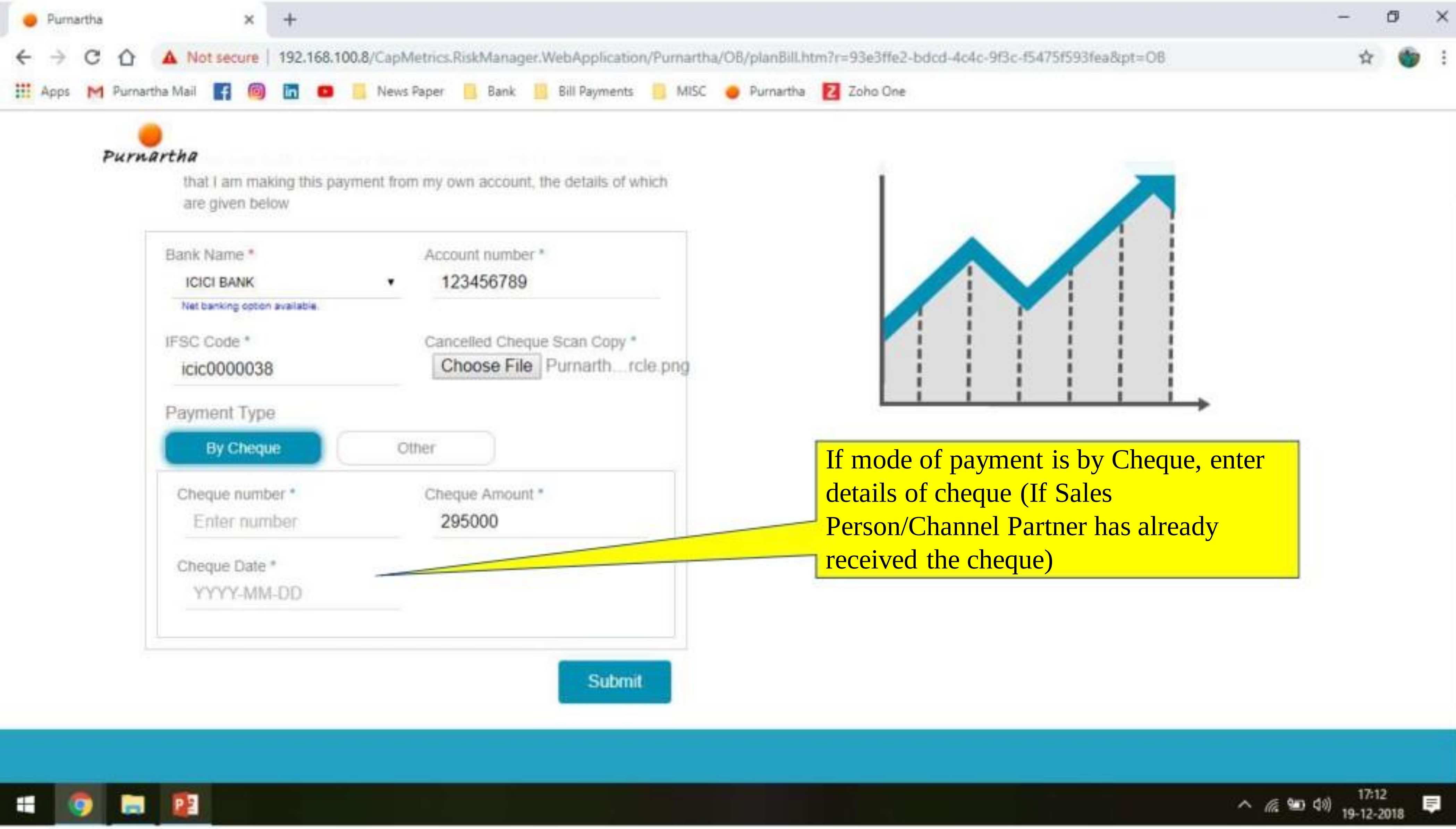
Enter appropriate details about client for SIP cases
Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Personal Details
Risk Profiling
Payment
Investment Mode:
Plan Type
Regular
SIP
Plan Period
1 Year
3 Years
Initial Amount
Enter initial amount
SIP Amount *
Enter amount
Do you have Reference Code?
Yes
SP00004
Next
17:10
19-12-2018


Enter appropriate details about client's plan selection
Purnartha
Not secure
192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Risk Profiling
Payment
Choose Plan:
AUM ₹ 1,00,00,000.00
*Fee's shown in following plan options are according to above AUM
Plan A
Initial Fee to pay ₹ 2,95,000.00
(includes 18% GST ₹ 45,000.00)
Initial Fee (% of AUM) 2.50%
Hurdle Rate (Annual) 25.00%
Profit Sharing (% above hurdle rate) 20.00%
Buy
Plan B
Initial Fee to pay ₹ 2,36,000.00
(includes 18% GST ₹ 36,000.00)
Initial Fee (% of AUM) 2.00%
Hurdle Rate (Annual) 15.00%
Profit Sharing (% above hurdle rate) 20.00%
Buy
17:11
19-12-2018

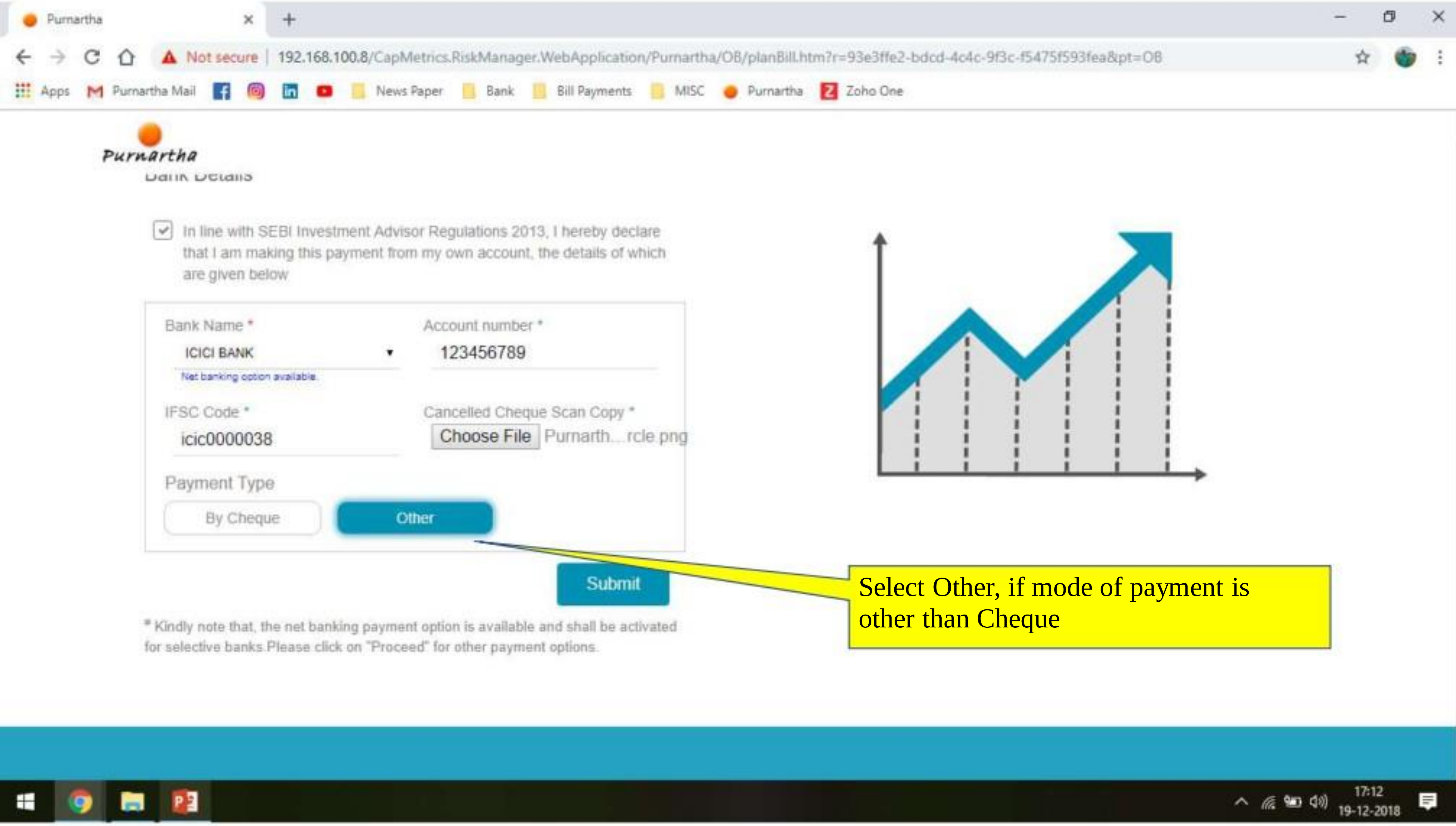

Purnartha
192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/OnBoarding.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Not secure
You have opted to buy Plan A
Confirm
Cancel
Personal Details
Risk Profiling
Choose Plan:
AUM ₹ 1,00,00,000.00
*Fee's shown in following plan options are according to above AUM
Plan A
Initial Fee to pay ₹ 2,95,000.00
(includes 18% GST ₹ 45,000.00)
Initial Fee (% of AUM) 2.50%
Hurdle Rate (Annual) 25.00%
Profit Sharing (% above hurdle rate) 20.00%
Buy
Plan B
Initial Fee to pay ₹ 2,36,000.00
(includes 18% GST ₹ 36,000.00)
Initial Fee (% of AUM) 2.00%
Hurdle Rate (Annual) 15.00%
Profit Sharing (% above hurdle rate) 20.00%
Buy
17:11
19-12-2018

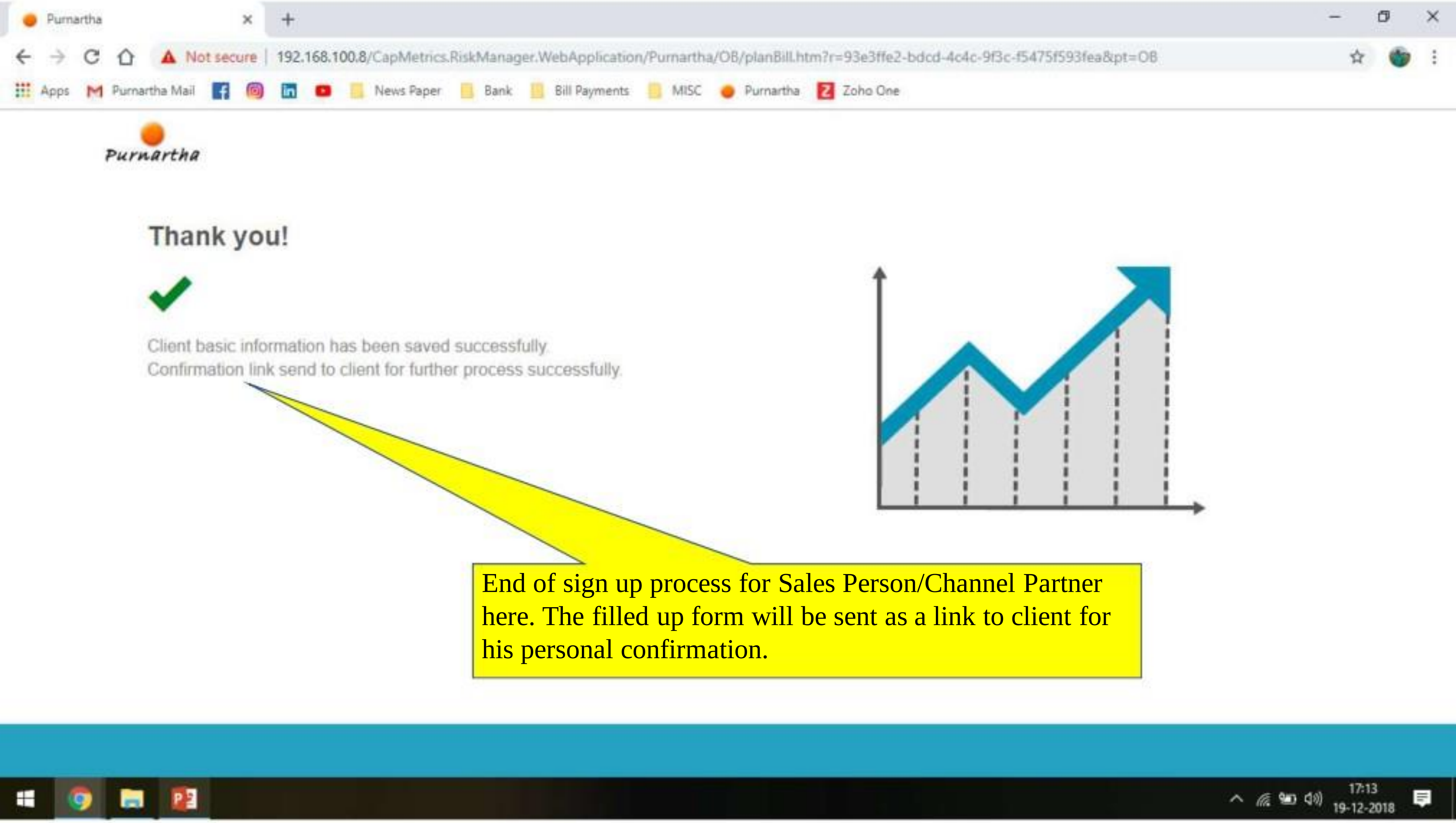
Enter appropriate details about payment to be received from client



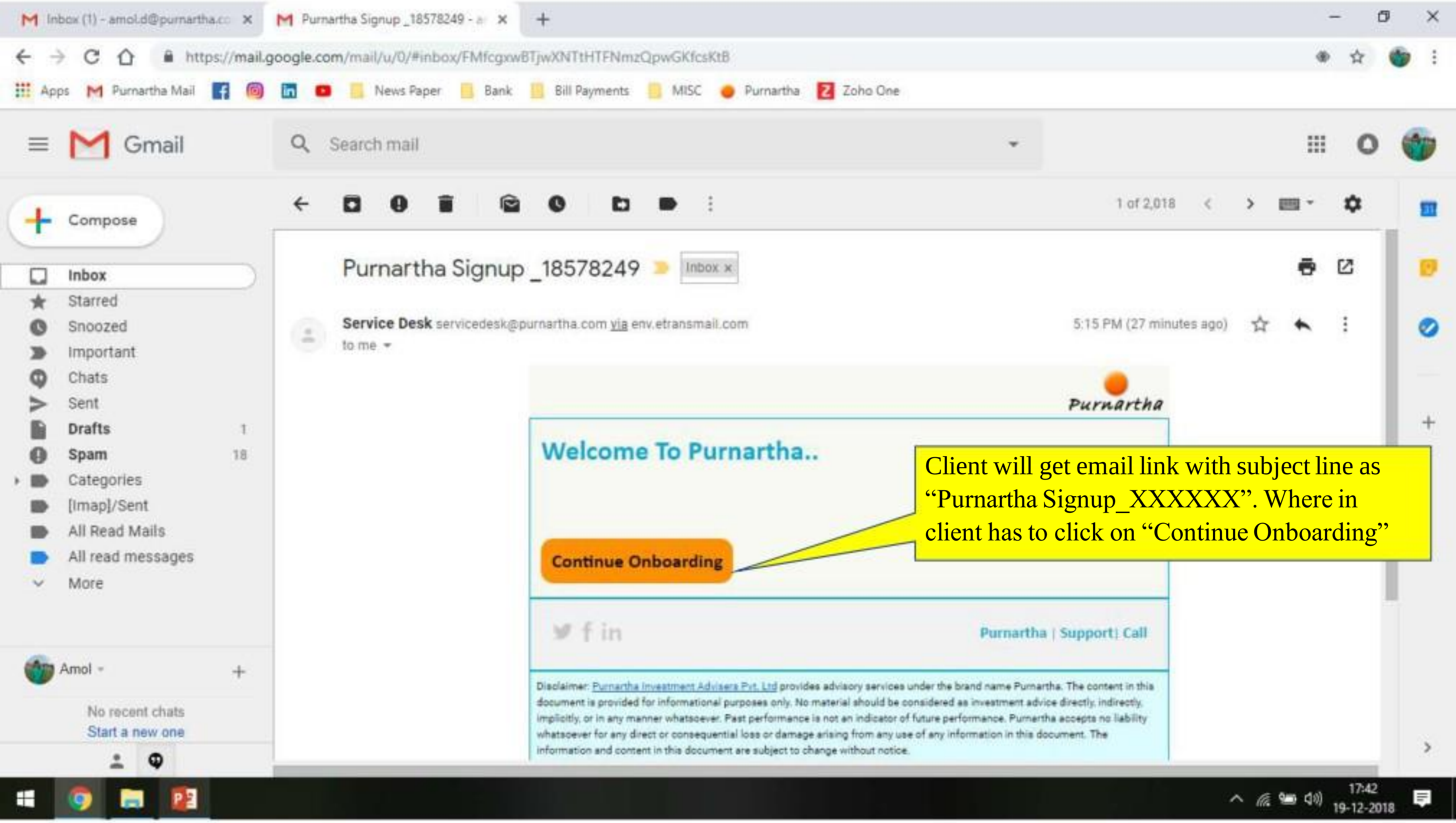


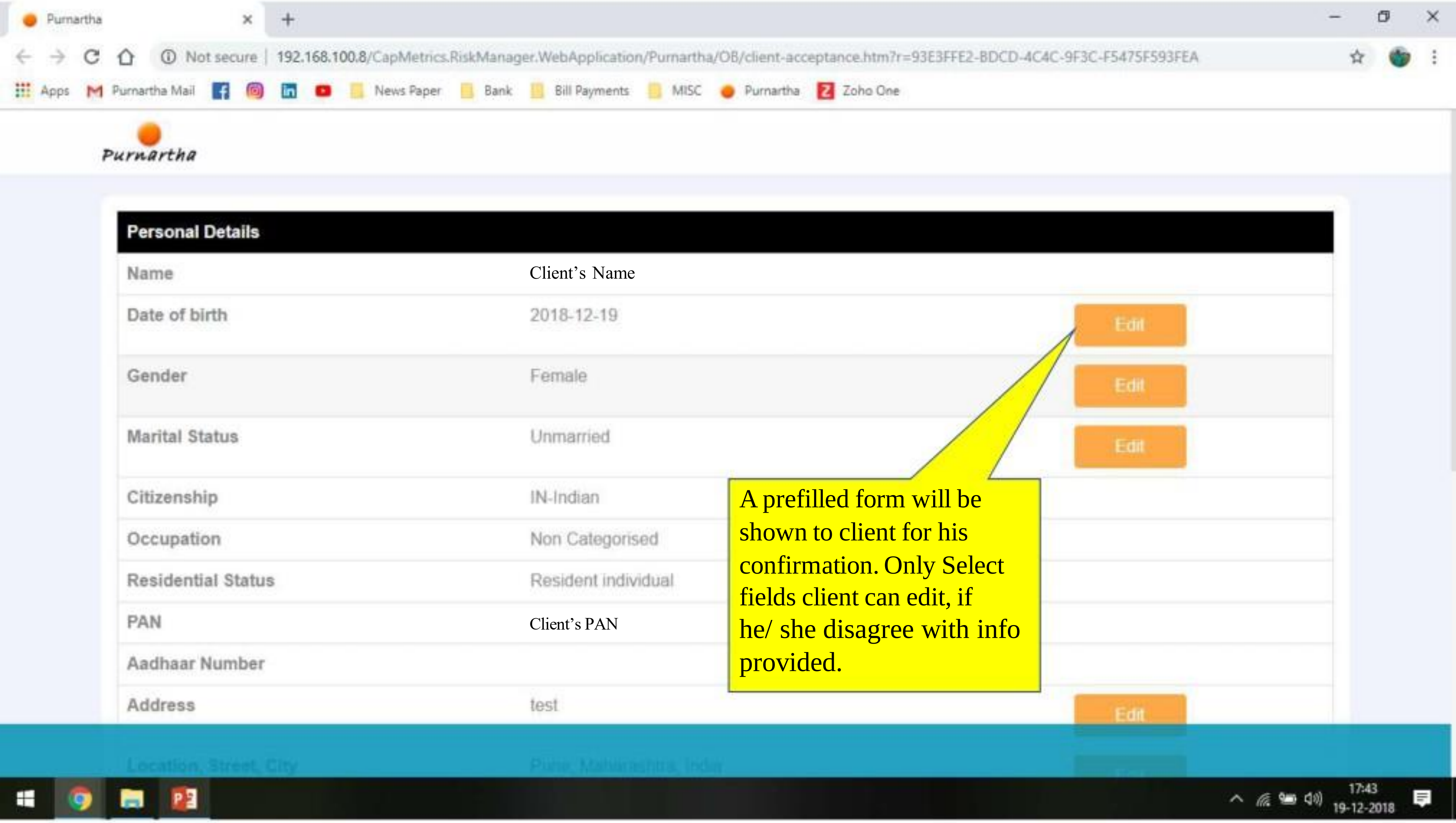
If mode of payment is by Cheque, enter details of cheque (If Sales Person/Channel Partner has already received the cheque)

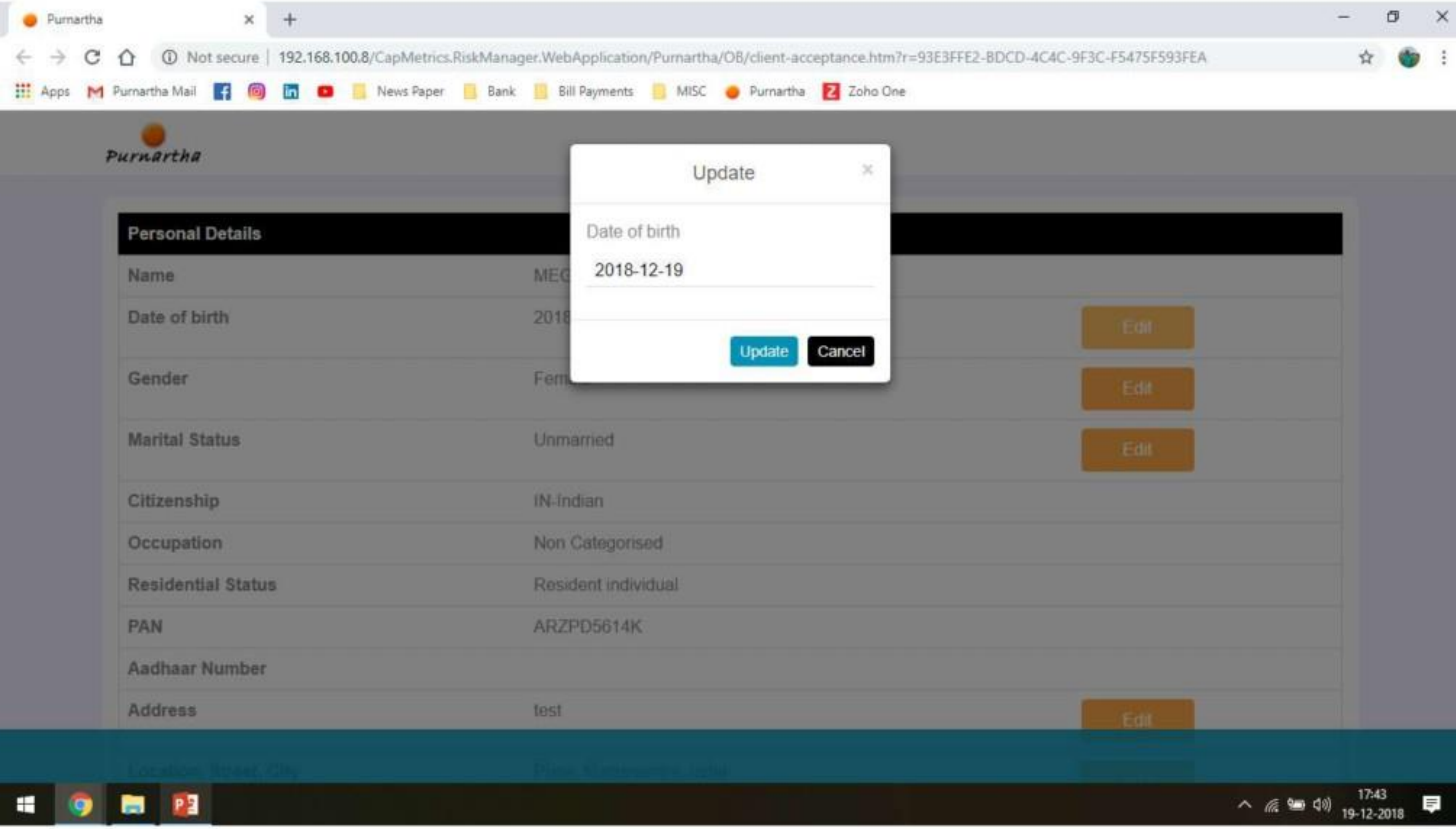

Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/planBill.htm?r=93e3ffe2-bdcd-4c4c-9f3c-f5475f593fea&pt=OB
Apps Purnartha Mail News Paper Bank Bill Payments MISC Purnartha Zoho One
Purnartha
Bank Details
In line with SEBI Investment Advisor Regulations 2013, I hereby declare that I am making this payment from my own account, the details of which are given below
Bank Name *
ICICI BANK
Net banking option available.
Account number *
123456789
IFSC Code *
icic0000038
Cancelled Cheque Scan Copy *
Choose File Purnarth....rcle.png
Payment Type
By Cheque
Other
Submit
* Kindly note that, the net banking payment option is available and shall be activated for selective banks.Please click on "Proceed" for other payment options.
Select Other, if mode of payment is other than Cheque
17:12
19-12-2018



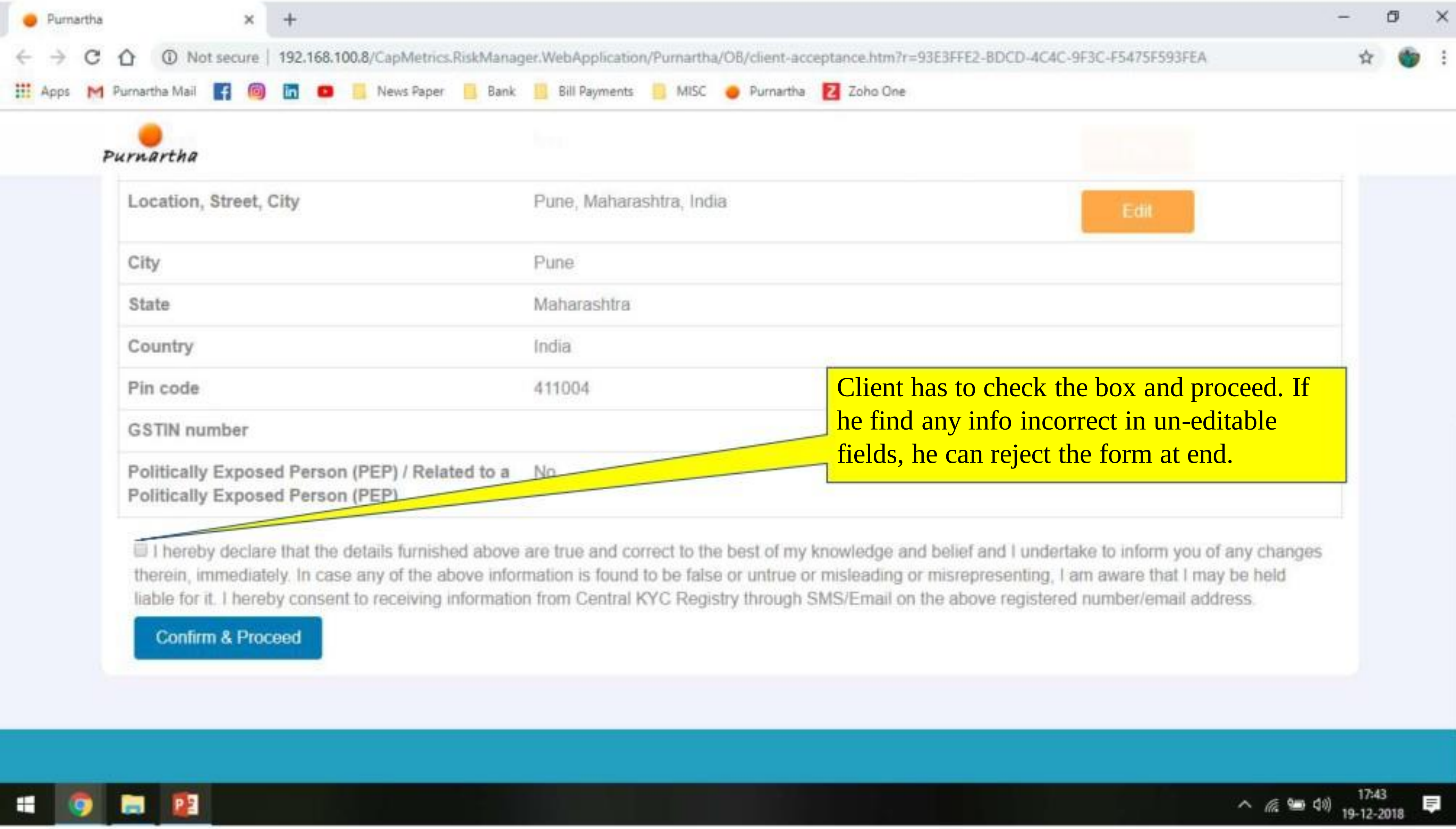
End of sign up process for Sales Person/Channel Partner here. The filled up form will be sent as a link to client for his personal confirmation.


Gmail
Search mail
Compose
Inbox
Starred
Snoozed
Important
Chats
Sent
Drafts
Spam
Categories
[Imap]/Sent
All Read Mails
All read messages
More
1 of 2,018
Purnartha Signup _18578249
Inbox
Service Desk servicedesk@purnartha.com via env.etransmail.com
to me
5:15 PM (27 minutes ago)
Purnartha
Welcome To Purnartha..
Continue Onboarding
Purnartha | Support | Call
Client will get email link with subject line as "Purnartha Signup_XXXXXX". Where in client has to click on "Continue Onboarding"

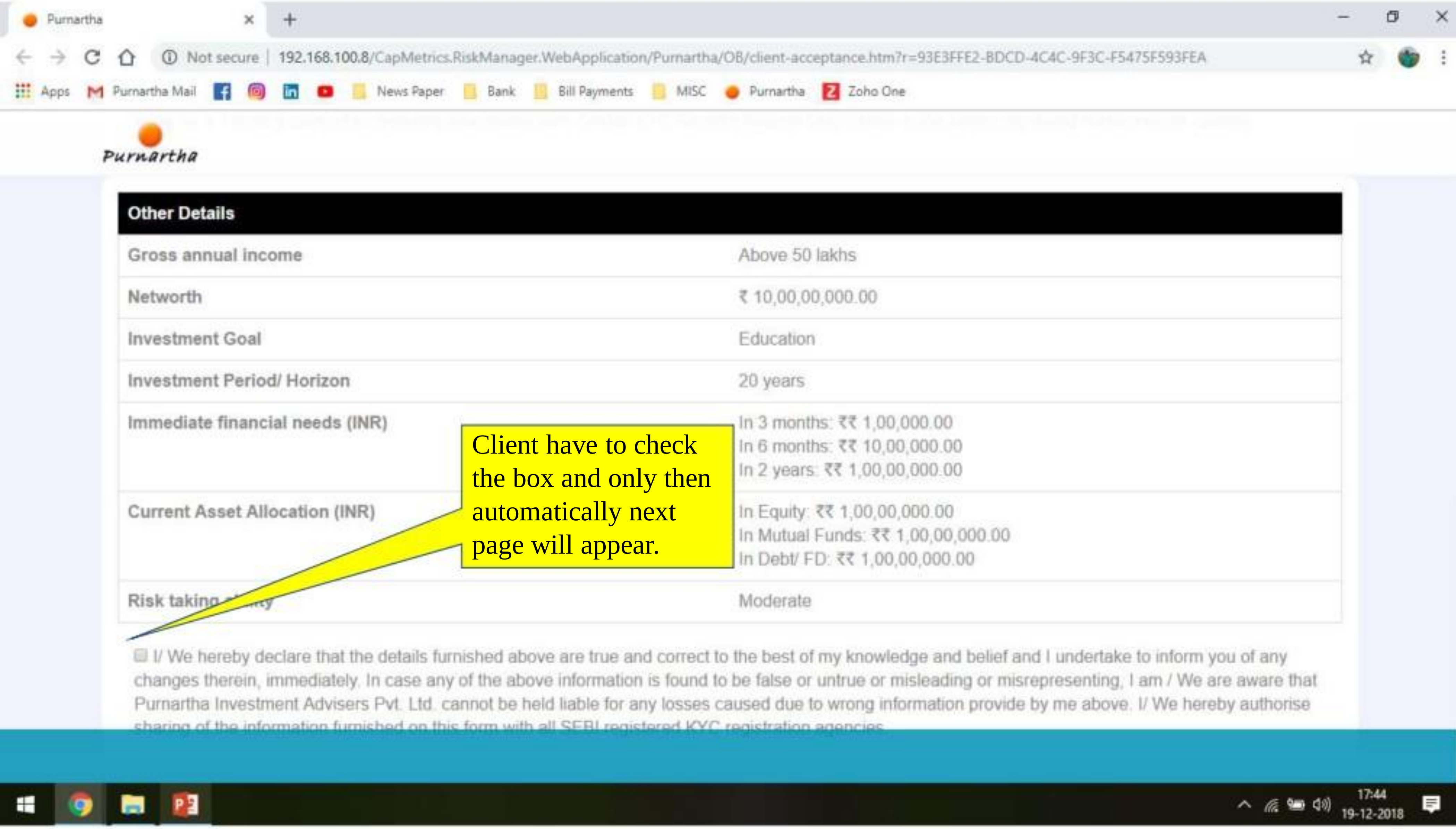

Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Name
Client's Name
Date of birth
2018-12-19
Edit
Gender
Female
Edit
Marital Status
Unmarried
Edit
Citizenship
IN-Indian
Occupation
Non Categorised
Residential Status
Resident individual
PAN
Client's PAN
Aadhaar Number
Address
test
Edit
A prefilled form will be shown to client for his confirmation. Only Select fields client can edit, if he/ she disagree with info provided.
17:43
19-12-2018



Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Personal Details
Name
Date of birth
Gender
Marital Status
Unmarried
Citizenship
IN-Indian
Occupation
Non Categorised
Residential Status
Resident individual
PAN
ARZPD5614K
Aadhaar Number
Address
test
Edit
Update
Date of birth
2018-12-19
Update
Cancel
17:43
19-12-2018



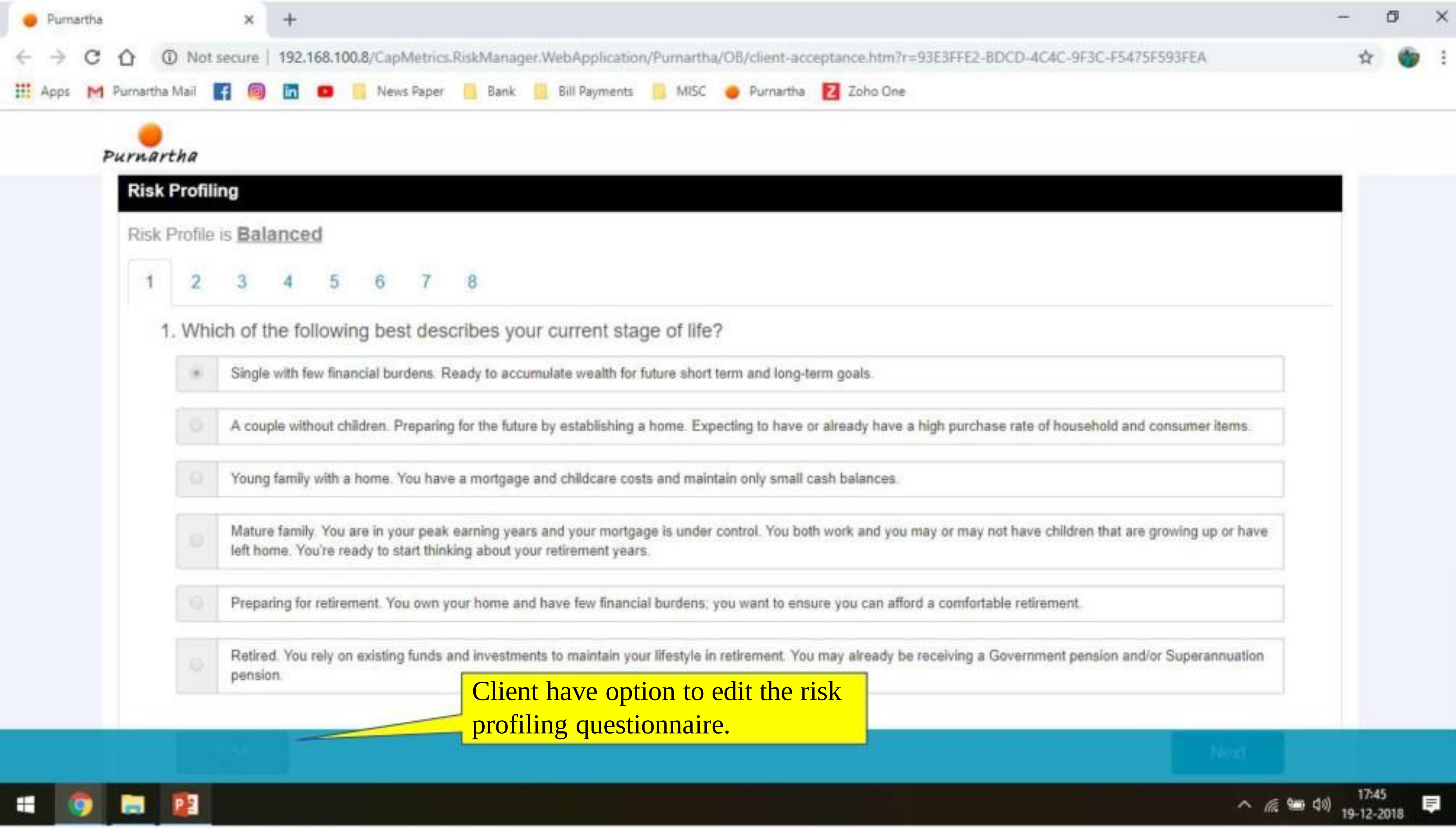
Client has to check the box and proceed. If he find any info incorrect in un-editable fields, he can reject the form at end.



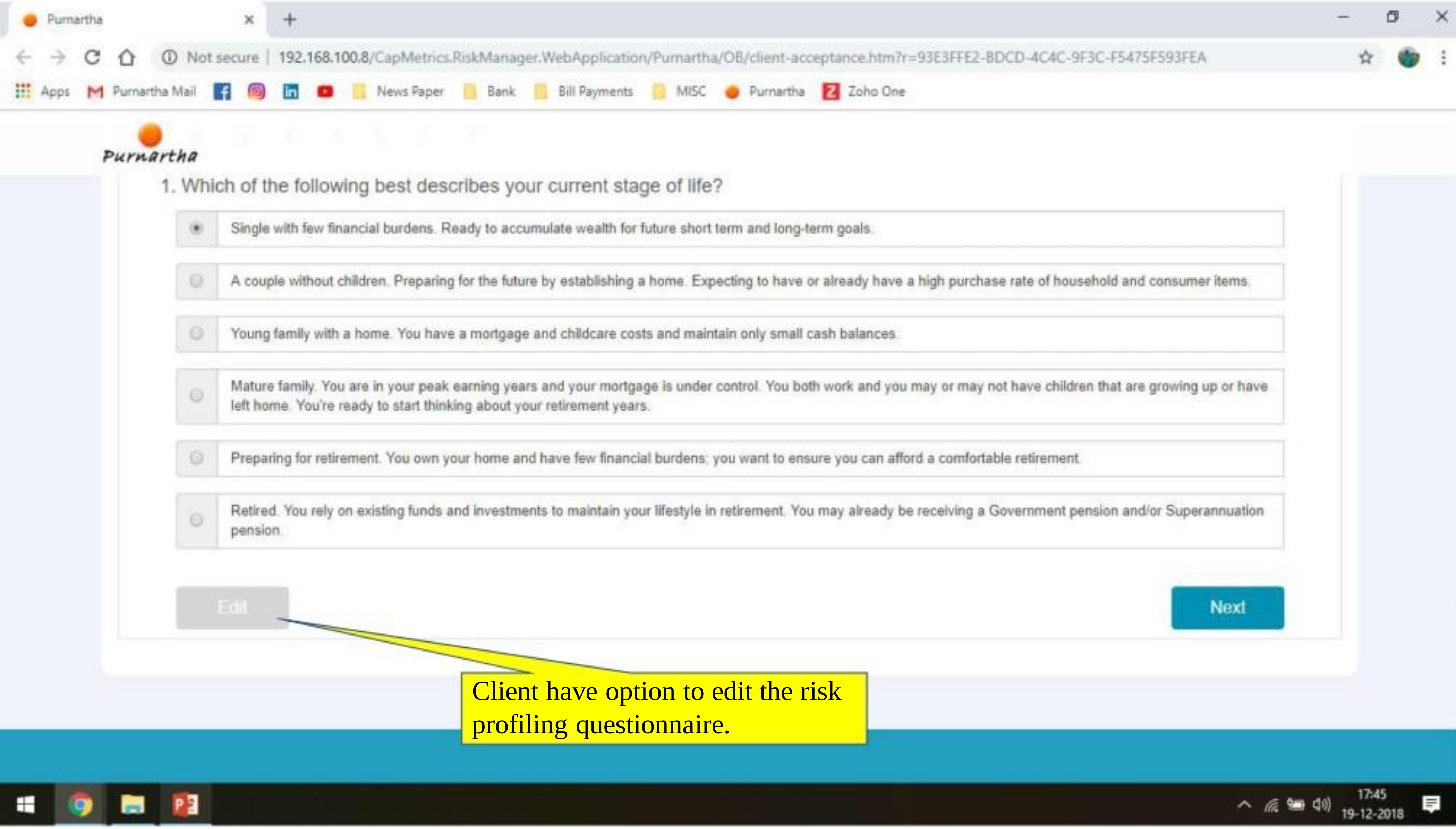
Other Details

Gross annual income	Above 50 lakhs
Networth	₹ 10,00,00,000.00
Investment Goal	Education
Investment Period/ Horizon	20 years
Immediate financial needs (INR)	In 3 months: ₹₹ 1,00,000.00 In 6 months: ₹₹ 10,00,000.00 In 2 years: ₹₹ 1,00,00,000.00
Current Asset Allocation (INR)	In Equity: ₹₹ 1,00,00,000.00 In Mutual Funds: ₹₹ 1,00,00,000.00 In Debt/ FD: ₹₹ 1,00,00,000.00
Risk taking ability	Moderate

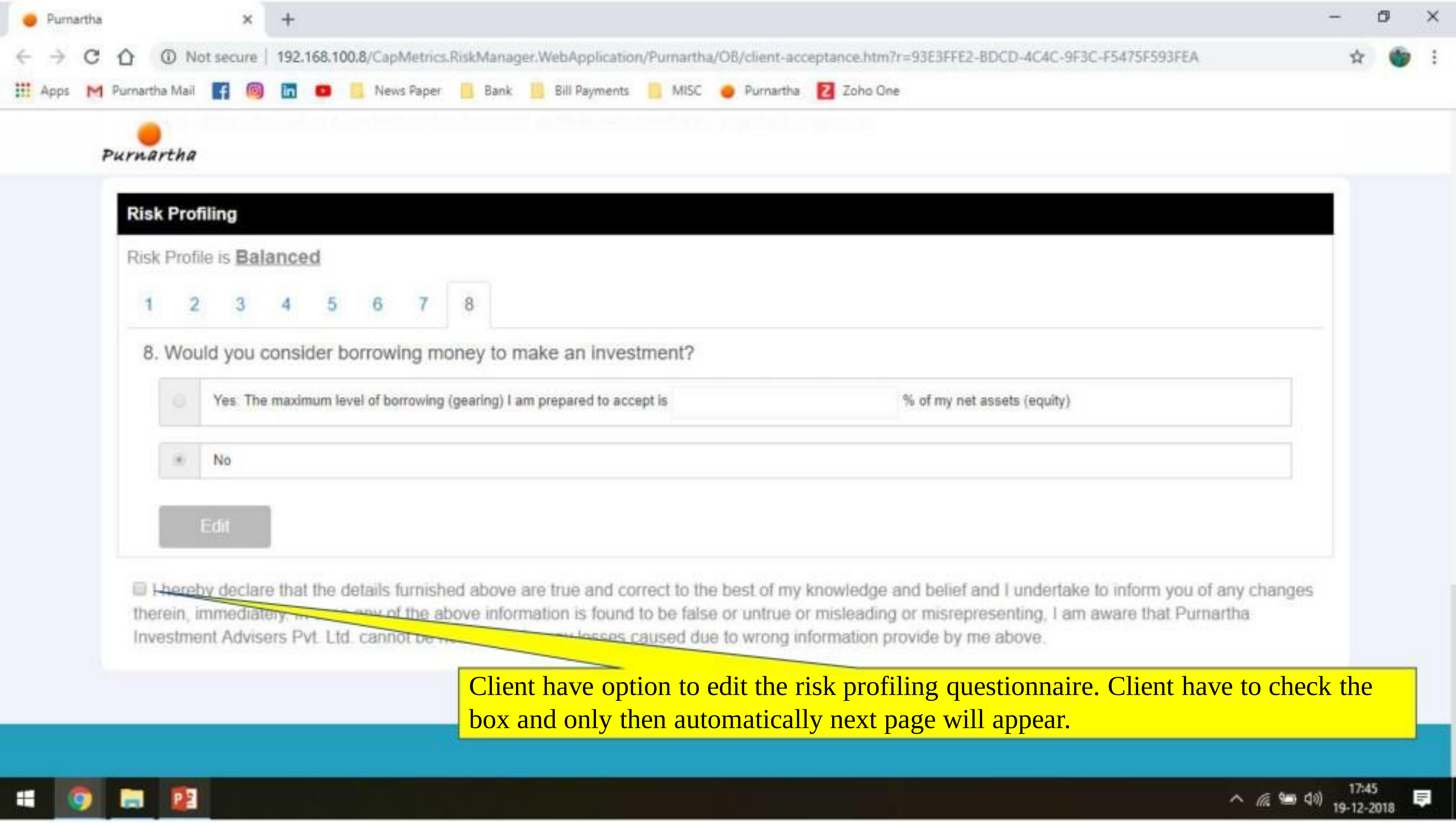
☐ I/ We hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am / We are aware that Purnartha Investment Advisers Pvt. Ltd. cannot be held liable for any losses caused due to wrong information provide by me above. I/ We hereby authorise sharing of the information furnished on this form with all SEBI registered KYC registration agencies.

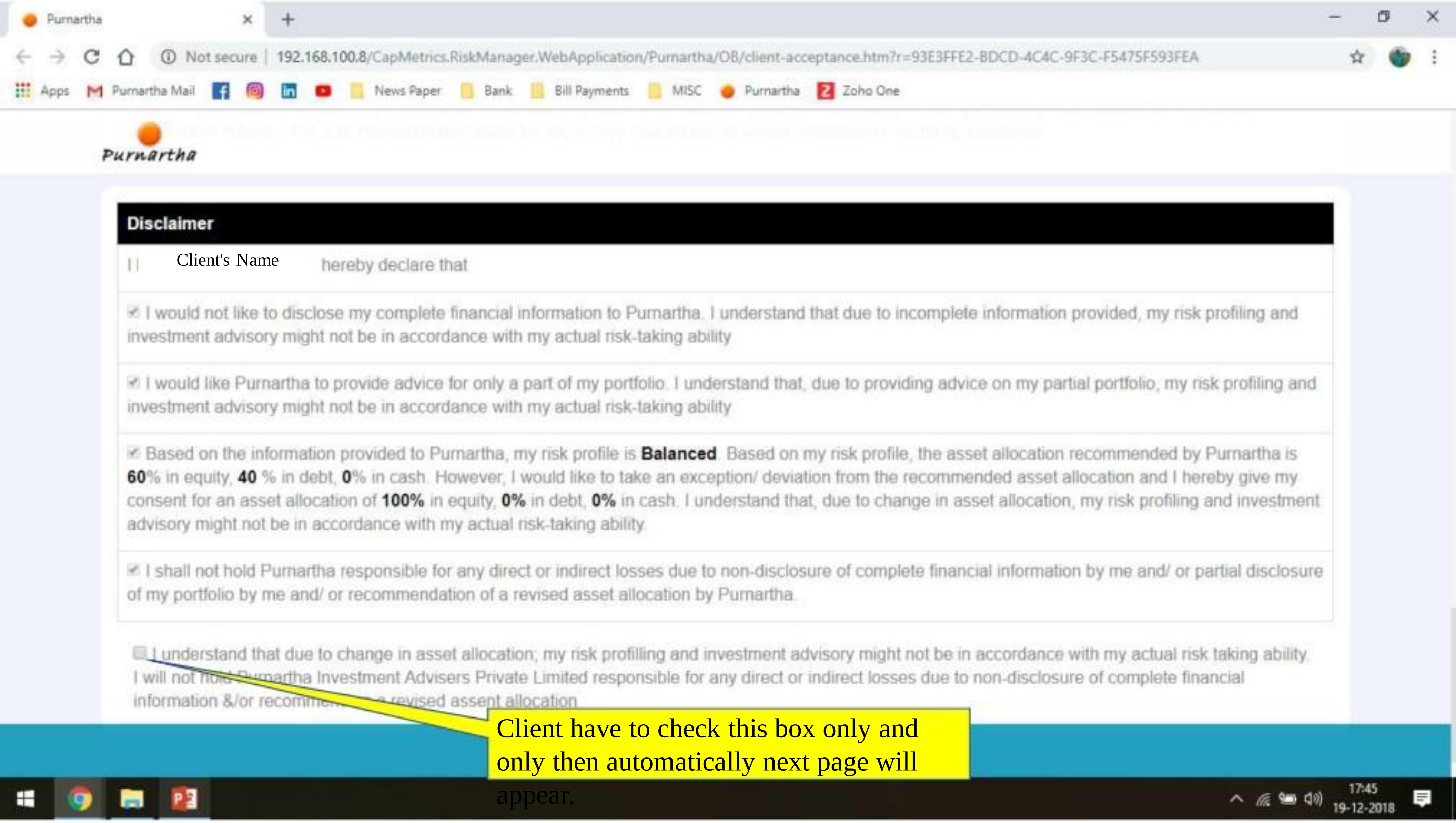


Client have option to edit the risk profiling questionnaire.



Client have option to edit the risk profiling questionnaire.


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Risk Profiling
Risk Profile is Balanced
1 2 3 4 5 6 7 8
8. Would you consider borrowing money to make an investment?
Yes: The maximum level of borrowing (gearing) I am prepared to accept is % of my net assets (equity)
No
Edit
I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately.
any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that Purnartha Investment Advisers Pvt. Ltd. cannot be
losses caused due to wrong information provide by me above.
Client have option to edit the risk profiling questionnaire. Client have to check the box and only then automatically next page will appear.
17:45
19-12-2018



Purnartha

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Apps · Purnartha Mail · News Paper · Bank · Bill Payments · MISC · Purnartha · Zoho One

Disclaimer

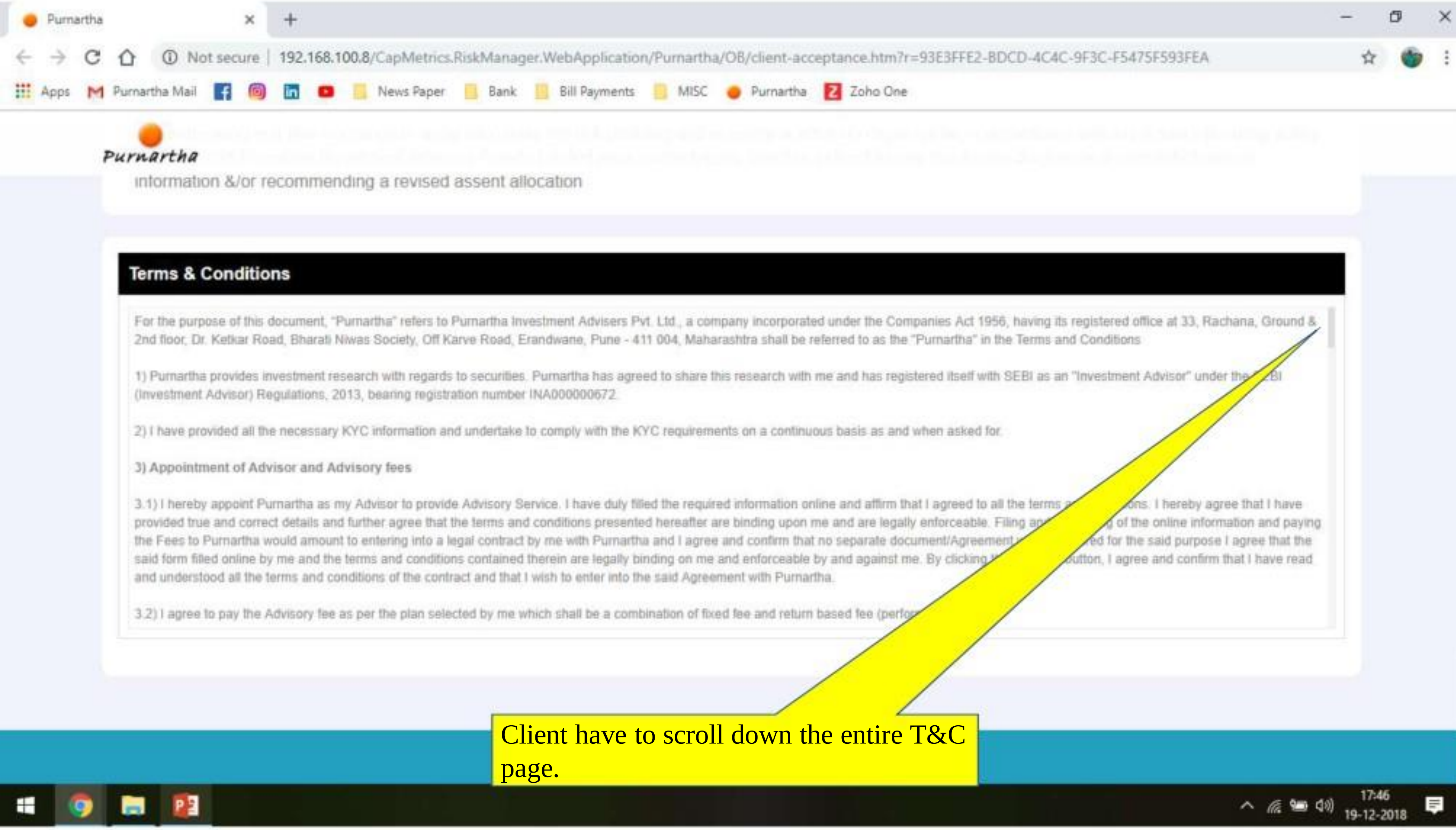
I Client's Name hereby declare that

- ☑ I would not like to disclose my complete financial information to Purnartha. I understand that due to incomplete information provided, my risk profiling and investment advisory might not be in accordance with my actual risk-taking ability
- ☑ I would like Purnartha to provide advice for only a part of my portfolio. I understand that, due to providing advice on my partial portfolio, my risk profiling and investment advisory might not be in accordance with my actual risk-taking ability
- ☑ Based on the information provided to Purnartha, my risk profile is **Balanced**. Based on my risk profile, the asset allocation recommended by Purnartha is **60**% in equity, **40** % in debt, **0**% in cash. However, I would like to take an exception/ deviation from the recommended asset allocation and I hereby give my consent for an asset allocation of **100%** in equity, **0%** in debt, **0%** in cash. I understand that, due to change in asset allocation, my risk profiling and investment advisory might not be in accordance with my actual risk-taking ability
- ☑ I shall not hold Purnartha responsible for any direct or indirect losses due to non-disclosure of complete financial information by me and/ or partial disclosure of my portfolio by me and/ or recommendation of a revised asset allocation by Purnartha

☐ I understand that due to change in asset allocation; my risk profilling and investment advisory might not be in accordance with my actual risk taking ability. I will not hold Purnartha Investment Advisers Private Limited responsible for any direct or indirect losses due to non-disclosure of complete financial information &/or recommendation of a revised assent allocation

17:45
19-12-2018

Client have to check this box only and only then automatically next page will appear.



Purnartha

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Purnartha

information &/or recommending a revised assent allocation

Terms & Conditions

For the purpose of this document, "Purnartha" refers to Purnartha Investment Advisers Pvt. Ltd., a company incorporated under the Companies Act 1956, having its registered office at 33, Rachana, Ground & 2nd floor, Dr. Ketkar Road, Bharati Niwas Society, Off Karve Road, Erandwane, Pune - 411 004, Maharashtra shall be referred to as the "Purnartha" in the Terms and Conditions

1) Purnartha provides investment research with regards to securities. Purnartha has agreed to share this research with me and has registered itself with SEBI as an "Investment Advisor" under the [illegible]BI (Investment Advisor) Regulations, 2013, bearing registration number INA000000672.

2) I have provided all the necessary KYC information and undertake to comply with the KYC requirements on a continuous basis as and when asked for.

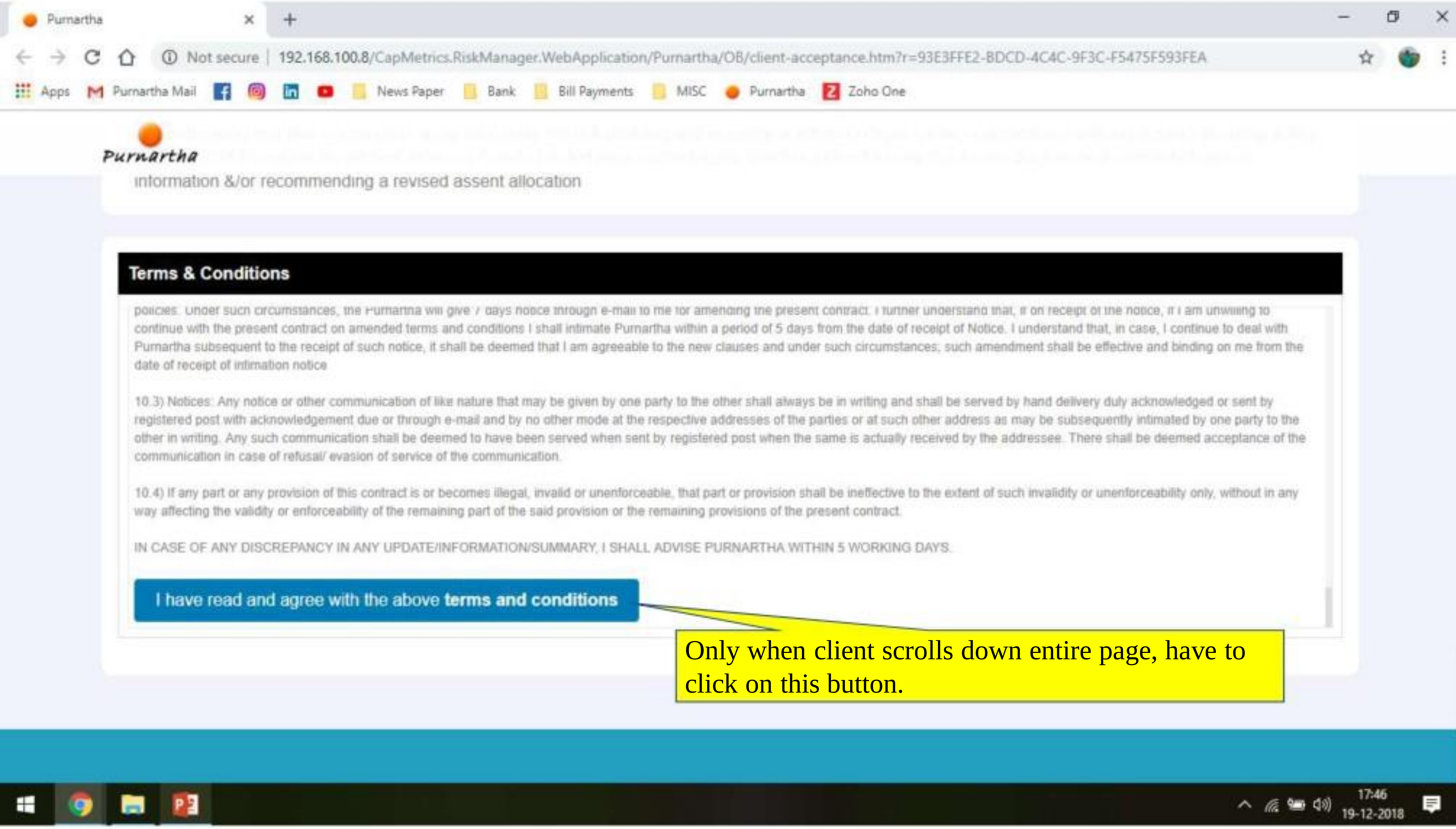
3) Appointment of Advisor and Advisory fees

3.1) I hereby appoint Purnartha as my Advisor to provide Advisory Service. I have duly filled the required information online and affirm that I agreed to all the terms a[illegible]ons. I hereby agree that I have provided true and correct details and further agree that the terms and conditions presented hereafter are binding upon me and are legally enforceable. Filing an[illegible]g of the online information and paying the Fees to Purnartha would amount to entering into a legal contract by me with Purnartha and I agree and confirm that no separate document/Agreement [illegible]ed for the said purpose I agree that the said form filled online by me and the terms and conditions contained therein are legally binding on me and enforceable by and against me. By clicking [illegible]utton, I agree and confirm that I have read and understood all the terms and conditions of the contract and that I wish to enter into the said Agreement with Purnartha.

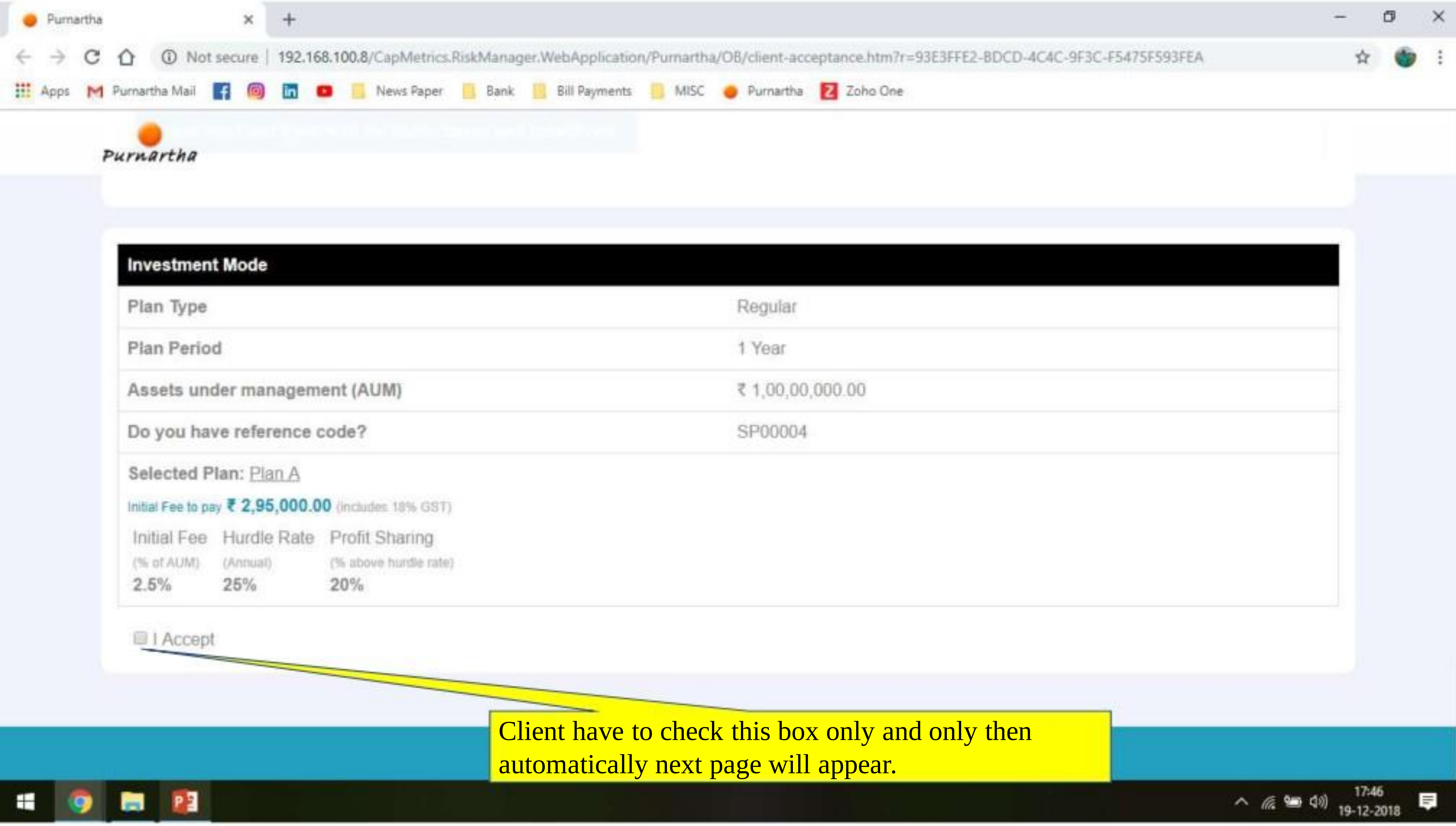
3.2) I agree to pay the Advisory fee as per the plan selected by me which shall be a combination of fixed fee and return based fee (perfo[illegible]

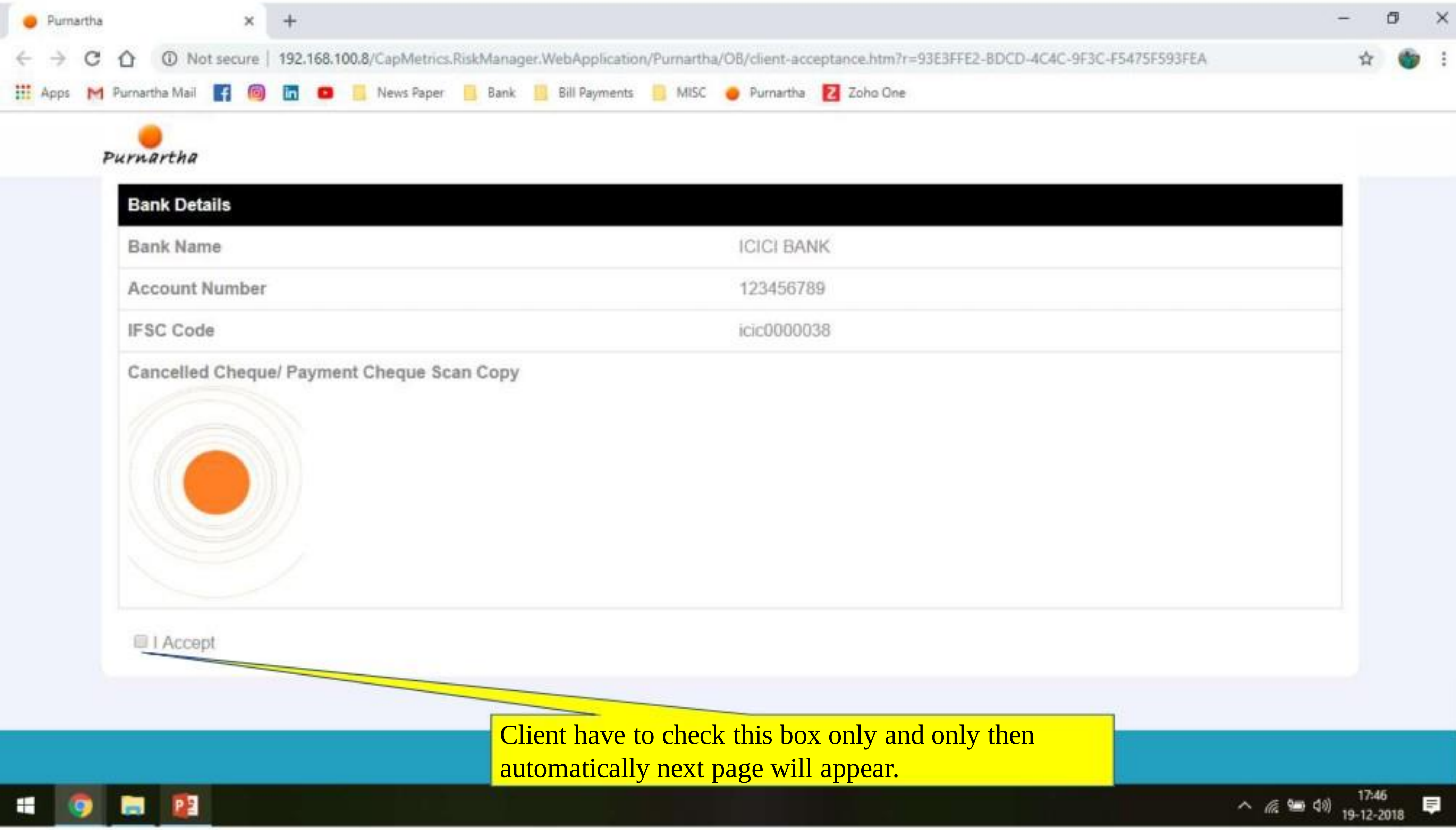
Client have to scroll down the entire T&C page.

17:46
19-12-2018

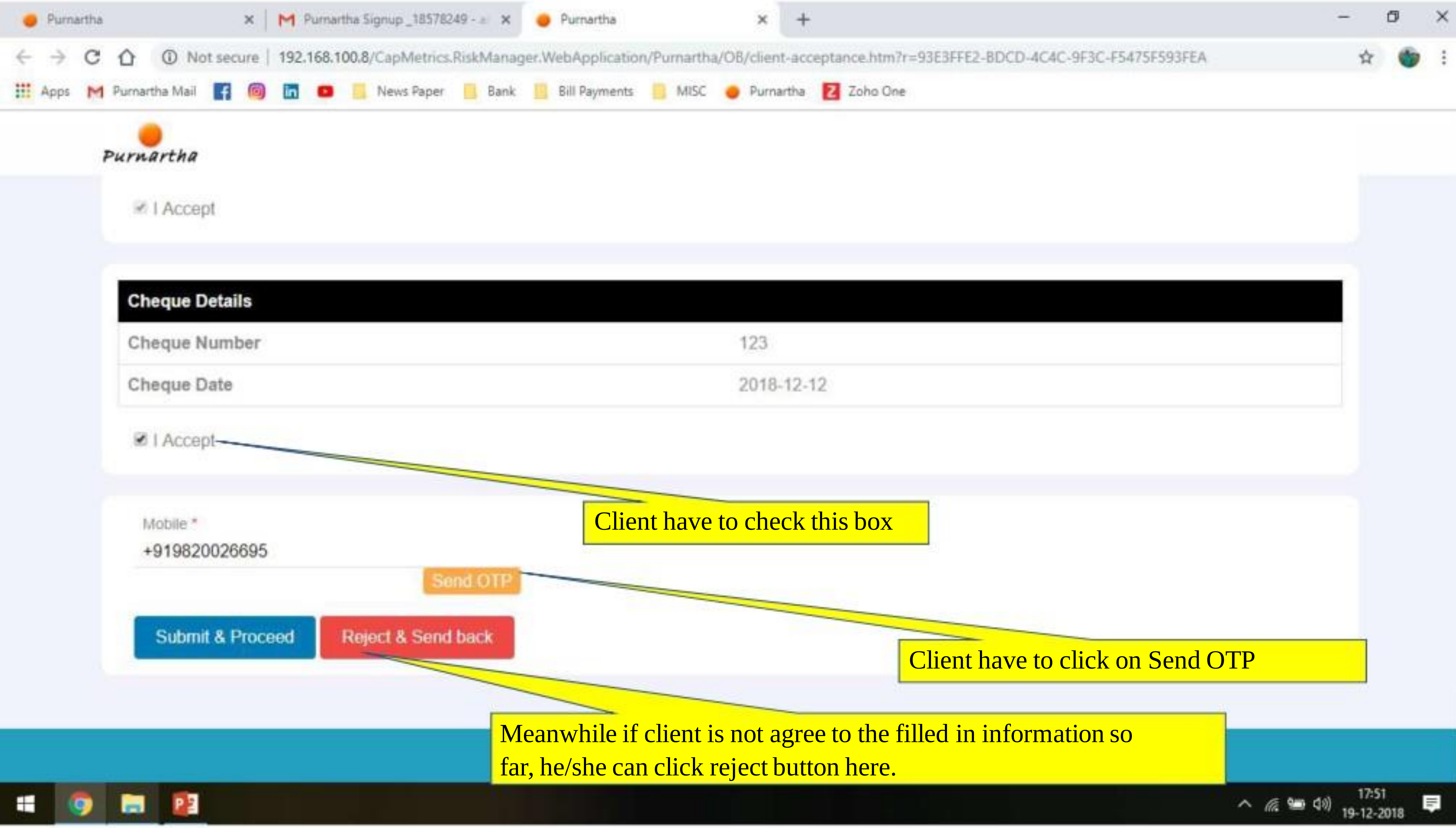


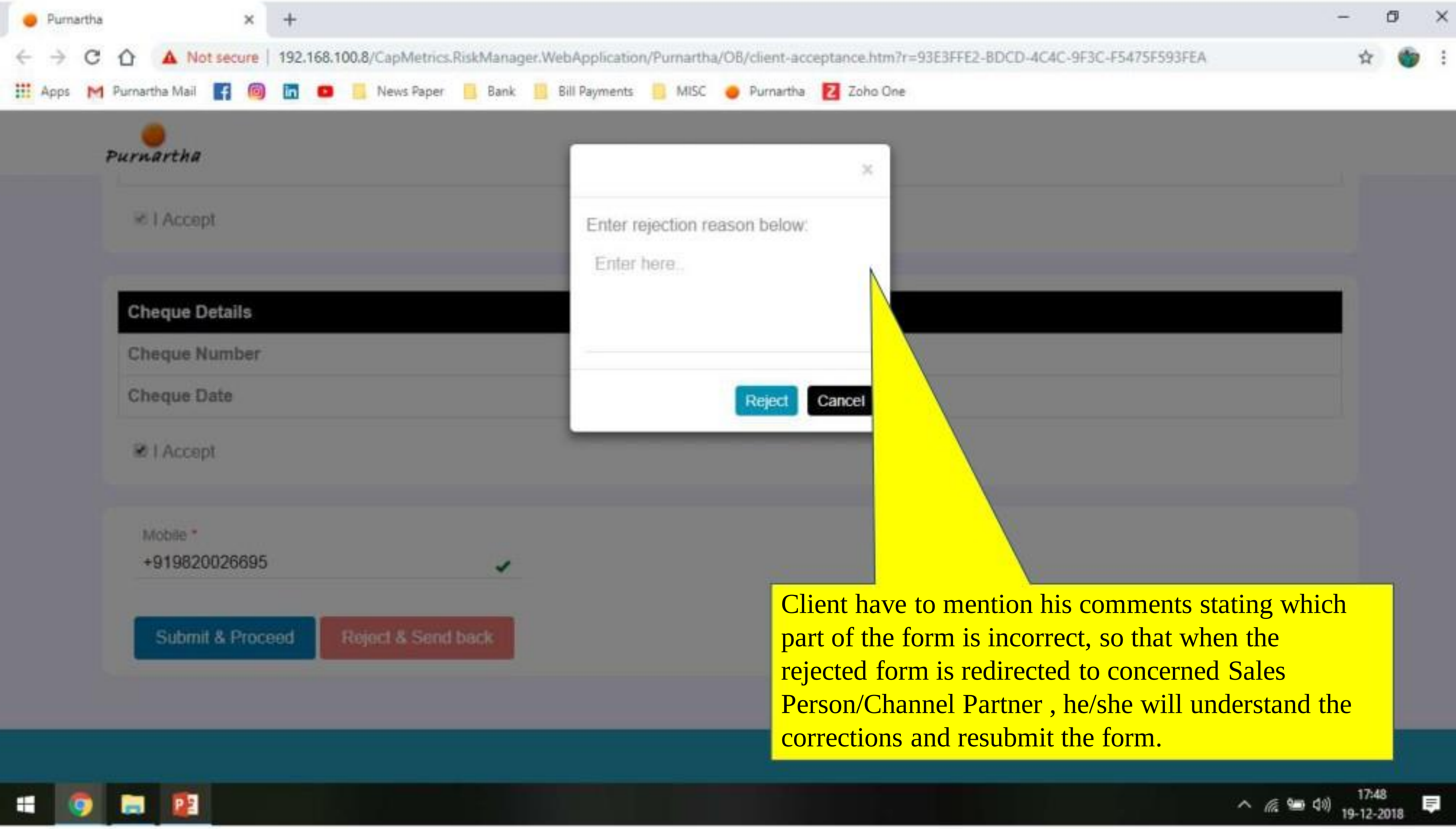
Only when client scrolls down entire page, have to click on this button.


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Investment Mode
Plan Type
Regular
Plan Period
1 Year
Assets under management (AUM)
₹ 1,00,00,000.00
Do you have reference code?
SP00004
Selected Plan: Plan A
Initial Fee to pay ₹ 2,95,000.00 (includes 18% GST)
Initial Fee
(% of AUM)
2.5%
Hurdle Rate
(Annual)
25%
Profit Sharing
(% above hurdle rate)
20%
I Accept
Client have to check this box only and only then automatically next page will appear.
17:46
19-12-2018

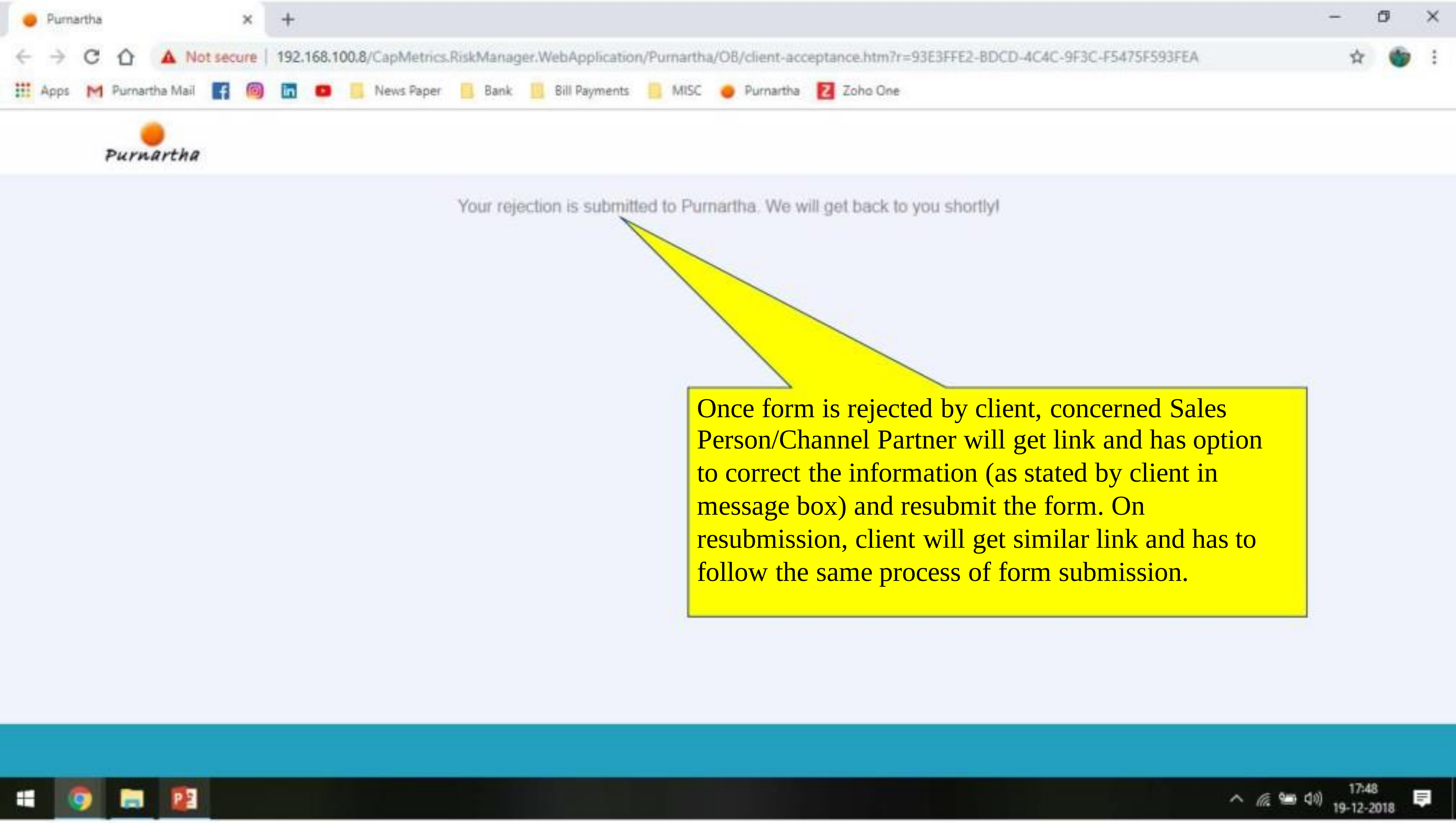


Client have to check this box only and only then automatically next page will appear.

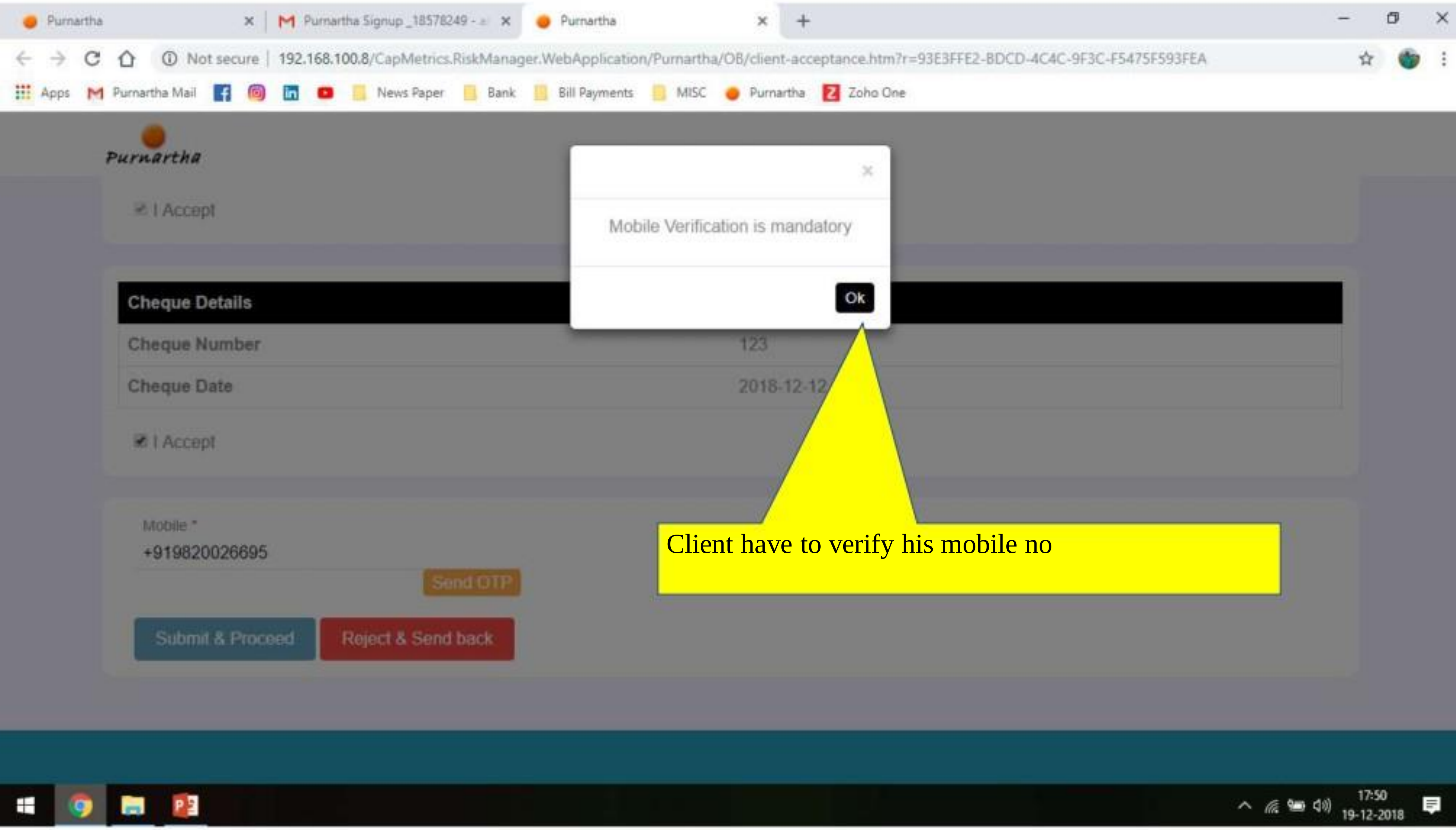

Purnartha
Purnartha Signup _18578249
Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
I Accept
Cheque Details
Cheque Number
123
Cheque Date
2018-12-12
I Accept
Client have to check this box
Mobile *
+919820026695
Send OTP
Submit & Proceed
Reject & Send back
Client have to click on Send OTP
Meanwhile if client is not agree to the filled in information so far, he/she can click reject button here.
17:51
19-12-2018

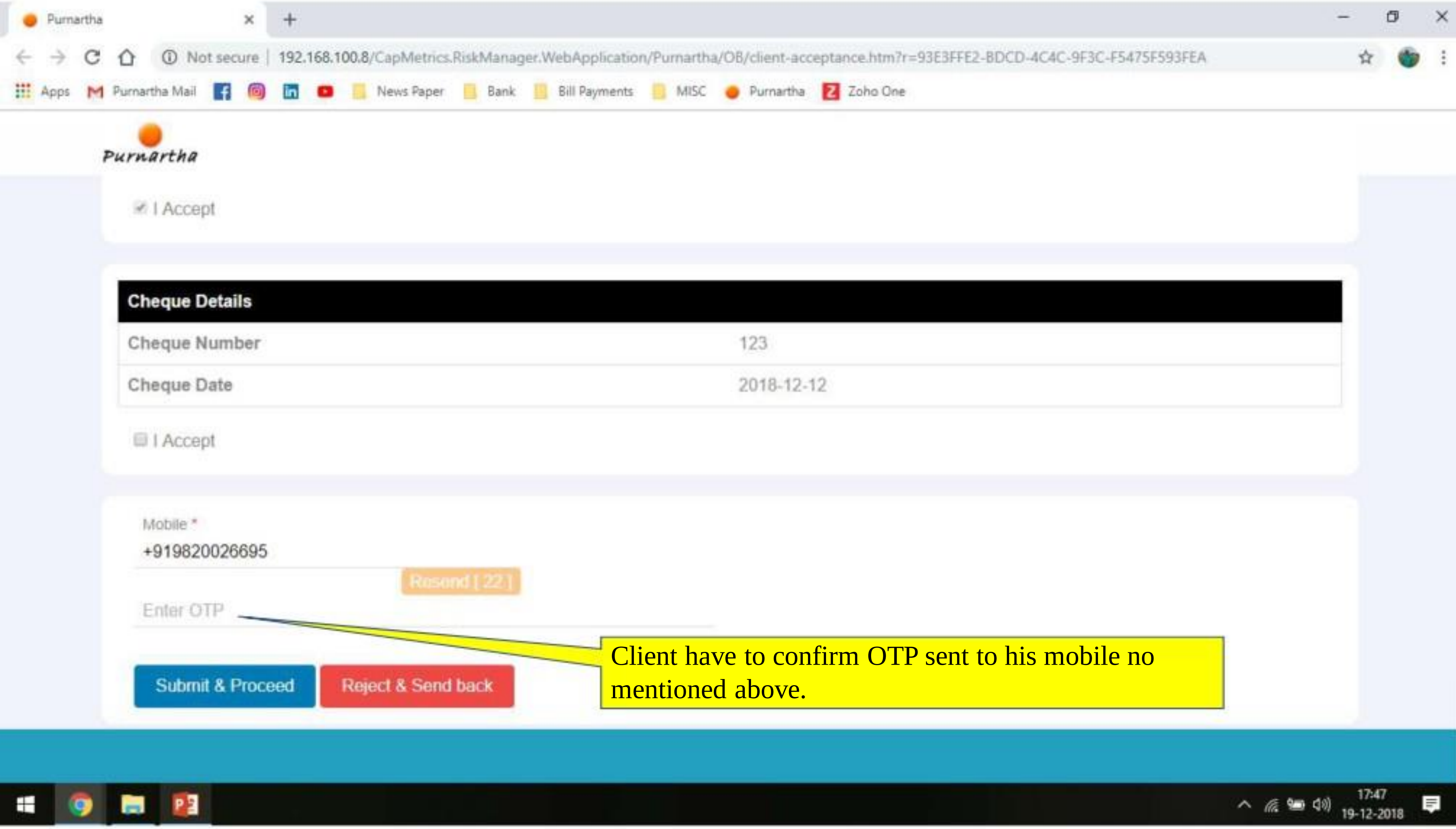


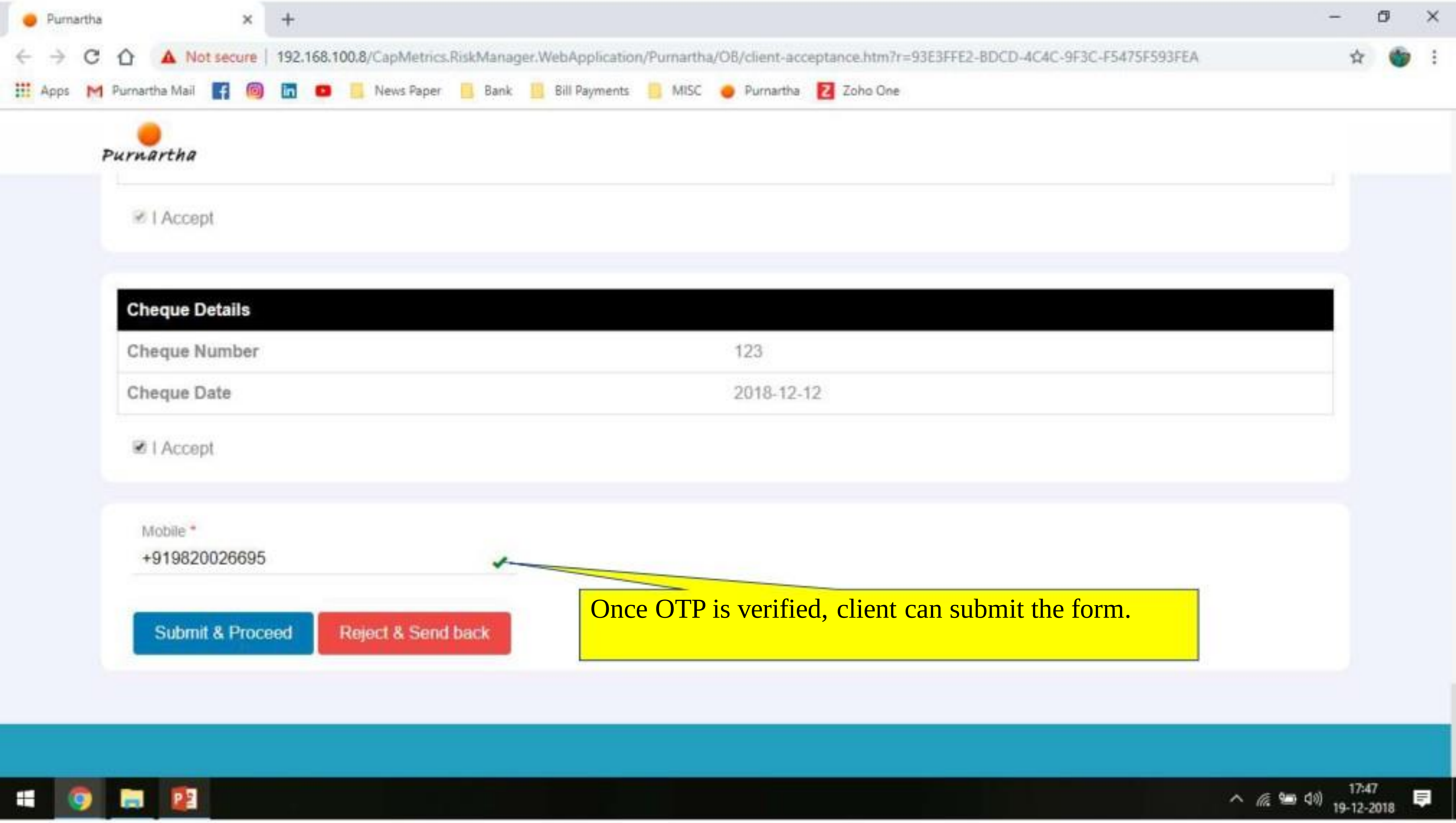
Client have to mention his comments stating which part of the form is incorrect, so that when the rejected form is redirected to concerned Sales Person/Channel Partner , he/she will understand the corrections and resubmit the form.

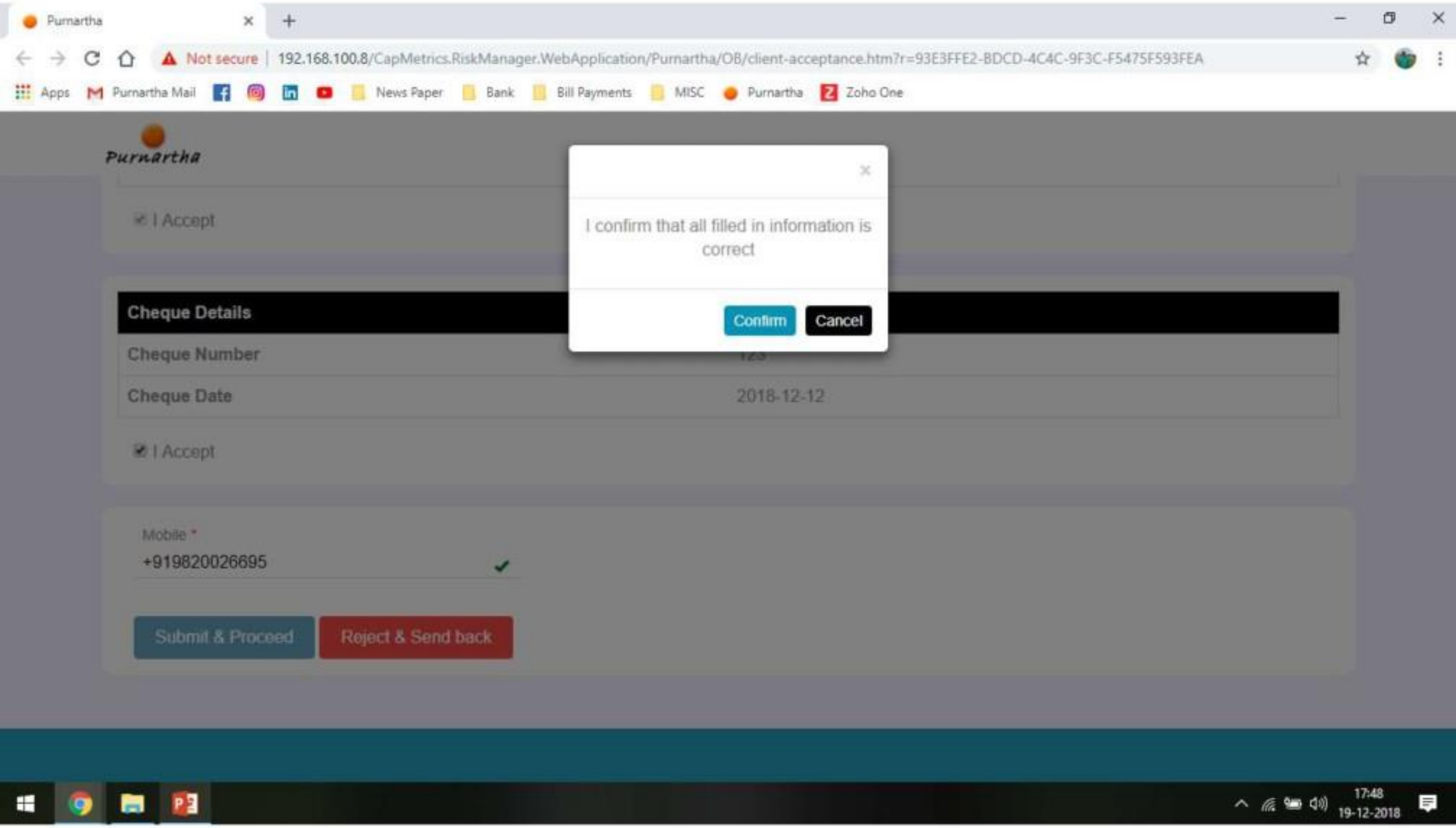


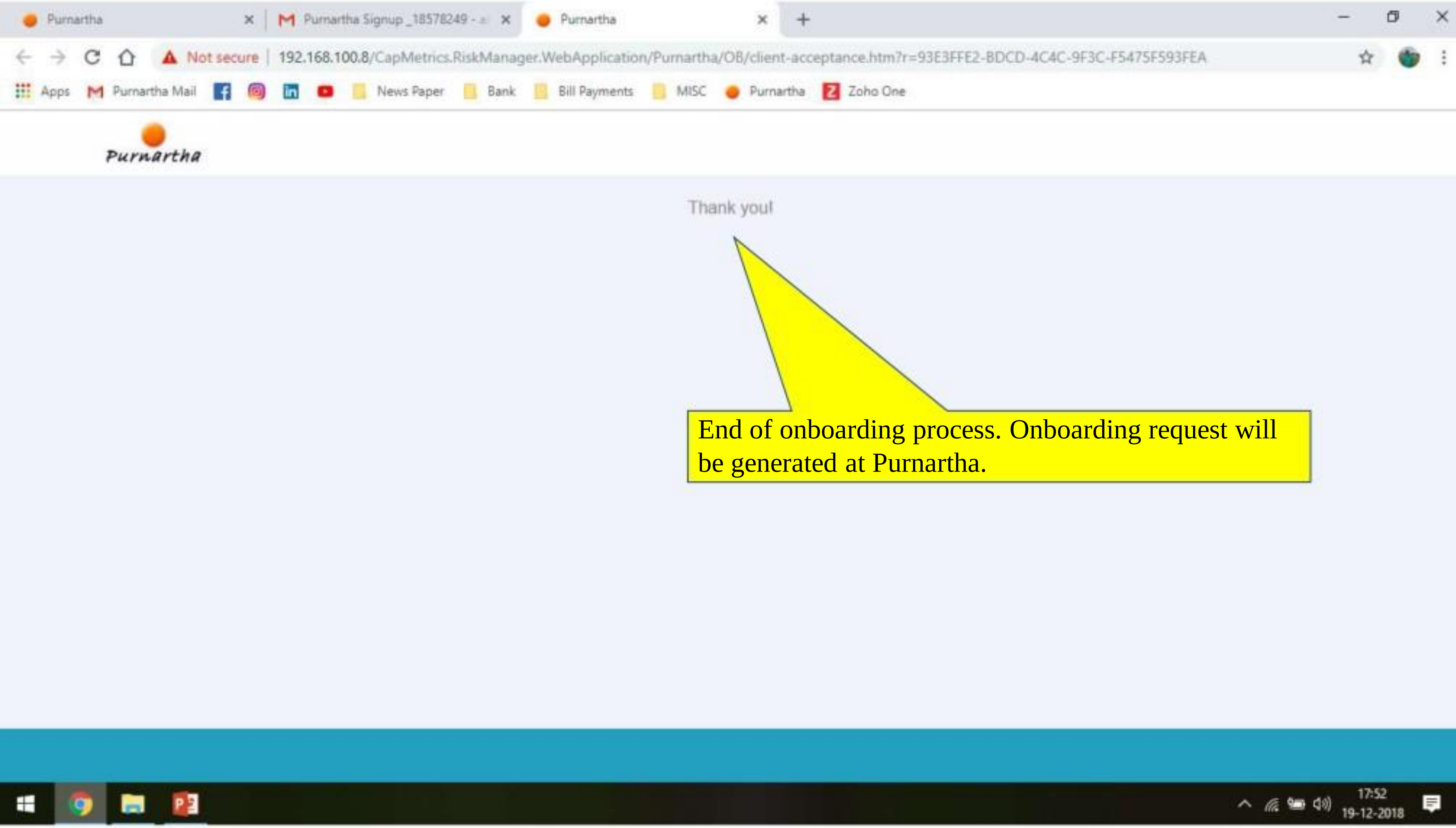
Once form is rejected by client, concerned Sales Person/Channel Partner will get link and has option to correct the information (as stated by client in message box) and resubmit the form. On resubmission, client will get similar link and has to follow the same process of form submission.


Purnartha
Purnartha Signup _18578249
Purnartha
Not secure
192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
I Accept
Mobile Verification is mandatory
Ok
Cheque Details
Cheque Number
123
Cheque Date
2018-12-12
I Accept
Mobile *
+919820026695
Send OTP
Submit & Proceed
Reject & Send back
Client have to verify his mobile no
17:50
19-12-2018


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
I Accept
Cheque Details
Cheque Number
123
Cheque Date
2018-12-12
I Accept
Mobile *
+919820026695
Resend [22]
Enter OTP
Submit & Proceed
Reject & Send back
Client have to confirm OTP sent to his mobile no mentioned above.
17:47
19-12-2018


Purnartha
192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
I Accept
Cheque Details
Cheque Number
123
Cheque Date
2018-12-12
I Accept
Mobile *
+919820026695
Submit & Proceed
Reject & Send back
Once OTP is verified, client can submit the form.
17:47
19-12-2018


Purnartha
Not secure | 192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
I Accept
I confirm that all filled in information is correct
Confirm
Cancel
Cheque Details
Cheque Number
Cheque Date
2018-12-12
I Accept
Mobile *
+919820026695
Submit & Proceed
Reject & Send back
17:48
19-12-2018


Purnartha
Purnartha Signup _18578249
Purnartha
Not secure
192.168.100.8/CapMetrics.RiskManager.WebApplication/Purnartha/OB/client-acceptance.htm?r=93E3FFE2-BDCD-4C4C-9F3C-F5475F593FEA
Apps
Purnartha Mail
News Paper
Bank
Bill Payments
MISC
Purnartha
Zoho One
Purnartha
Thank you!
End of onboarding process. Onboarding request will be generated at Purnartha.
17:52
19-12-2018