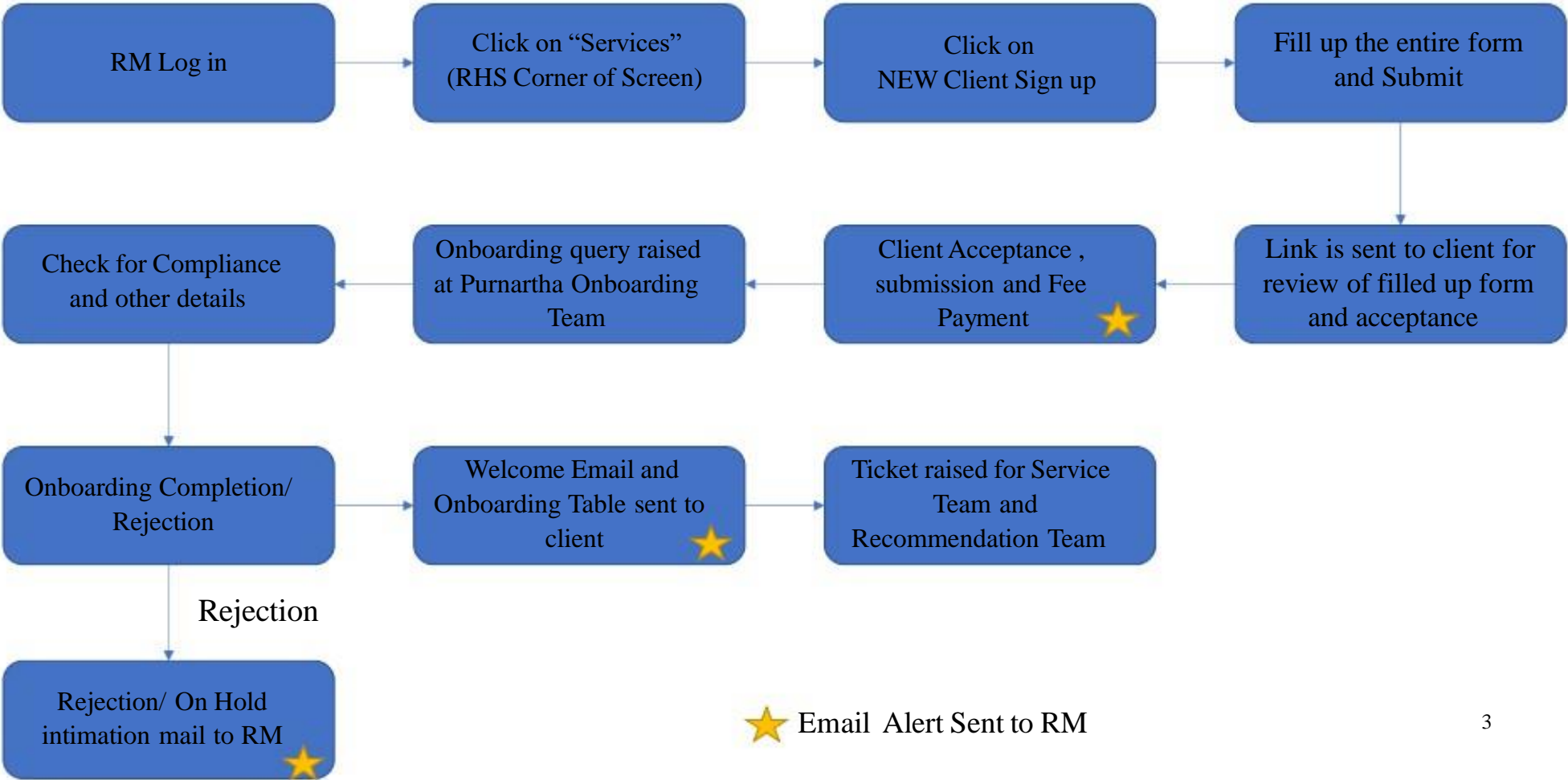


IMP Note:

- 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

Home Leads Activities Contacts Deals Reports Dashboards Documents Service

Welcome Sushilkumar Bharpure Home Page - Broking

Quick Links

Broking OneKey MF HR Learning Support CRM Advisory

Purnartha
Purnartha

all IIFL Intranet Applications. If u have any issue call Tech Support on 41514151

RM Request - Type wise Cases Count

You do not have permission to view this dashboard because:

1. The corresponding module or field may have been disabled in your profile settings, OR
2. The module could be listed in the Unselected Tabs section in Setup > Customization > Modules > Tabs.

RM Request - Statuswise cases count Daily

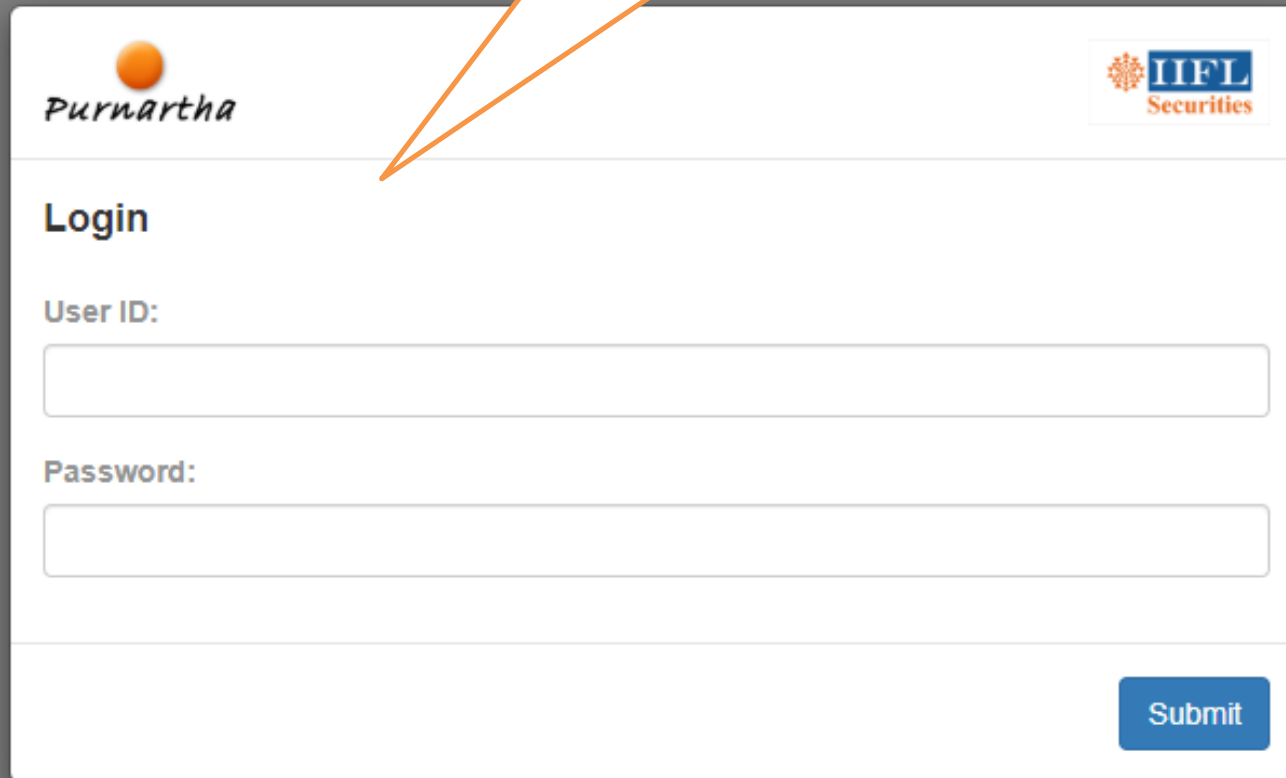
You do not have permission to view this dashboard because:


1. The corresponding module or field may have been disabled in your profile settings, OR
2. The module could be listed in the Unselected Tabs section in Setup > Customization > Modules > Tabs.


Activities - Statuswise Record Count

You do not have permission to view this dashboard because:

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



 Purnwartha



Login

User ID:

Password:

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



Verify OTP

Email:

DU****@IIFL.COM

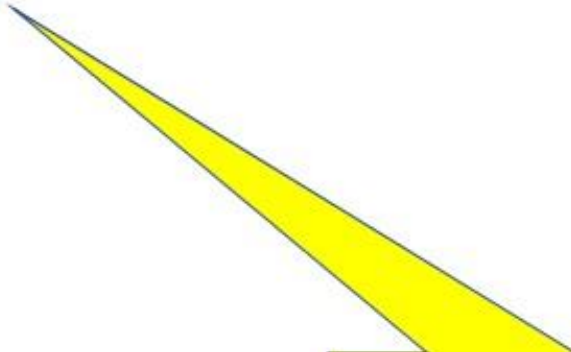
Mobile Number:

+9195****410

Send OTP

Services

- 1. [New Client SignUp](#)



Click on New Client Signup icon .



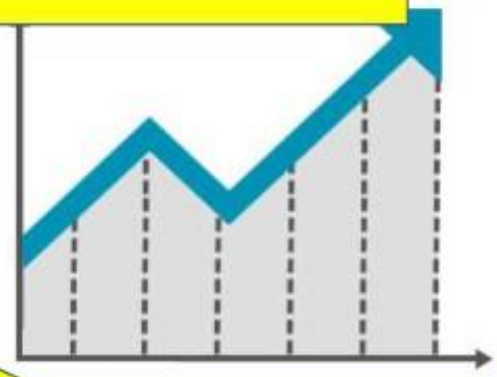
Personal Details

Full Name (as per PAN)*
Mr ▾ Enter full name

Email *
e.g. abc@xyz.com

Mobile *
+91 ▾ Enter number

Next



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

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

Let's start with KYC Check..

PAN Number *
AAAAA0000A

Check KYC

AADHAAR
e.g. 0000 0000 0000

Enter PAN number as per PAN card (Mandatory filed)

AADHAR Card Number (optional field)

Introduce yourself a bit more..

Individual

Non-Individual

Click for PAN card validation

Select Individual / Non - Individual

Name (as per PAN) *
As per PAN

DOB (as per PAN) *
yyyy-mm-dd

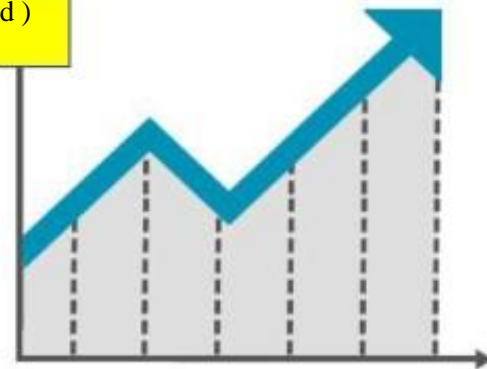
Gender

Marital Status

Occupation *
-Select-

Citizenship *
-Select-

Next



Let's start with KYC Check..

PAN Number *
AAAAA0000A

Check KYC

AADHAAR
e.g. 0000 0000 0000

Enter PAN number as per PAN card (Mandatory filed)

AADHAR Card Number (optional field)

Introduce yourself a bit more..

Individual

Non-Individual

Click for PAN card validation

Select Individual / Non - Individual

Name (as per PAN)*
As per PAN

Date of incorporation *
yyyy-mm-dd

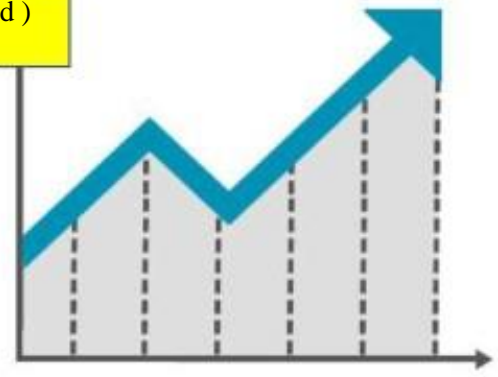
Place of Incorporation
Enter here

CIN
Enter here

Telephone Number
Enter here

Type of Entity *
Foreign Nationals/NRI

Next





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



Address Details

Address (As per PAN/ Aadhar) *
permanent address

State *
e.g. Maharashtra

Pin Code *
e.g. 411 004

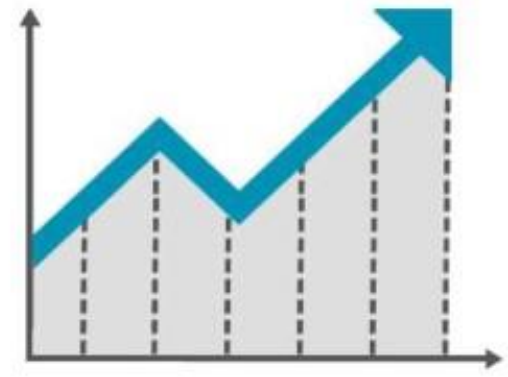
Location, Street, City *
e.g. Pune, Maharashtra, India

City *
e.g. Pune

Country *
e.g. India

Previous

Next





Enter appropriate details about client

Personal Details

Residential status

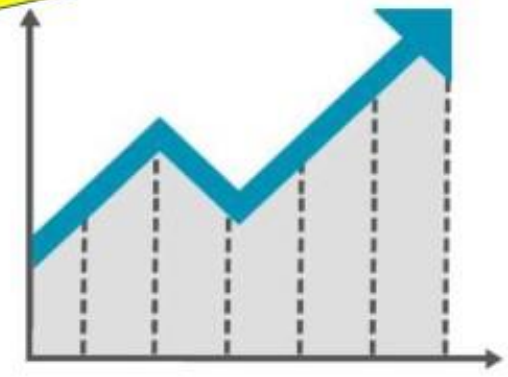
Resident individual	Non-resident Indian
Foreign National	Person of Indian Origin

Do you have GSTIN number? Yes

Politically Exposed Person (PEP)/ Related to a Politically Exposed Person (PEP) Yes

Previous

Next





Financial Details 1:

Gross annual income

<input checked="" type="radio"/> ₹ 5 - 10 Lakhs	<input type="radio"/> ₹ 10 - 25 Lakhs
<input type="radio"/> ₹ 25 - 50 Lakhs	<input type="radio"/> Above ₹ 50 lakhs

Networth (INR)

Amount

Investment goal

e.g. Child education

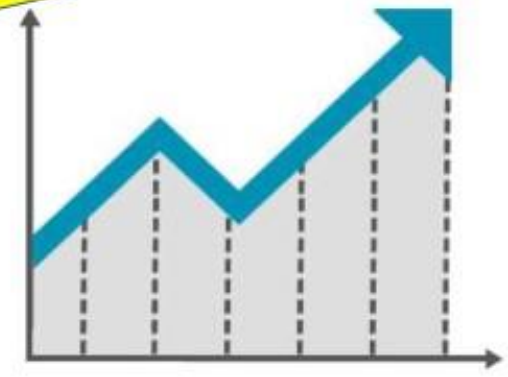
Investment Period/ Horizon

-Select-

Previous

Next

Enter appropriate details about client





Financial Details 2:

Immediate financial needs (INR)
In 3 months _____ In 9 months _____ In 2 years _____

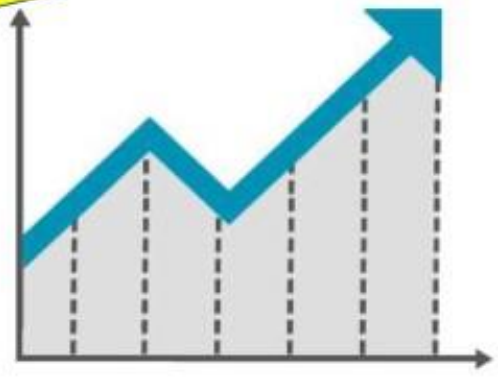
Current asset allocation (INR)
In equities _____ In mutual funds _____ in Debt/FD _____

Risk taking ability
 High Moderate Low

Previous

Next

Enter appropriate details about client





Personal Details



Risk Profiling

Payment

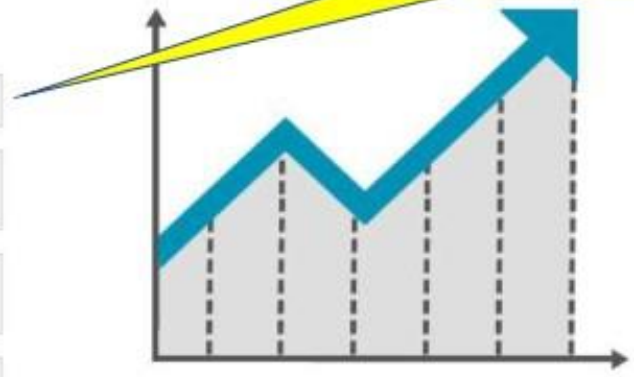
1. Which of the following best describes your current stage of life?

- Single with few financial burdens. Ready to accumulate wealth for future short term and long term goals.
- A couple without children. Preparing for the future by establishing a home. Expecting to have or already have a high purchase rate of household and consumer items.
- Young family with a home. You have a mortgage and childcare costs and maintain only small cash balances.
- Mature family. You are in your peak earning years and your mortgage is under control. You both work and you may or may not have children that are growing up or have left home. You're ready to start thinking about your retirement years.
- Preparing for retirement. You own your home and have few financial burdens; you want to ensure you can afford a comfortable retirement.
- Retired. You rely on existing funds and investments to maintain your lifestyle in retirement. You may already be receiving a Government pension and/or Superannuation pension.

Back

Next

Enter appropriate details about client





Personal Details

Risk Profiling

Payment

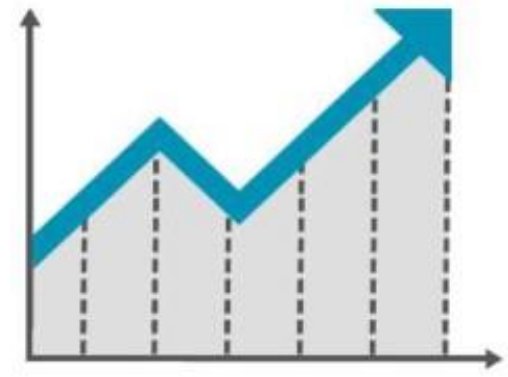
Enter appropriate details about client

2. How familiar are you with investment matters?

- Not familiar at all with investments and feel uncomfortable with the complexity.
- Not very familiar when it comes to investments.
- Somewhat familiar. I don't fully understand investments, including the share market.
- Fairly familiar. I understand the various factors which influence investment performance.
- Very familiar. I use research and other investment information to make investment decisions. I understand the various factors which influence investment performance.

Previous

Next





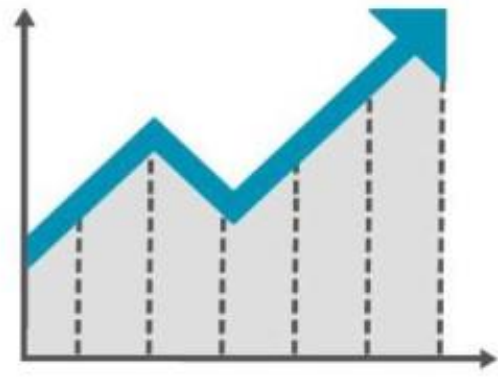
Enter appropriate details about client

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





Enter appropriate details about client

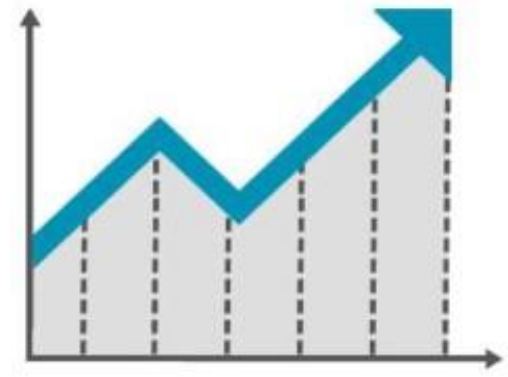
4. How long would you invest the majority of your money before you think you would need access to it?

(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





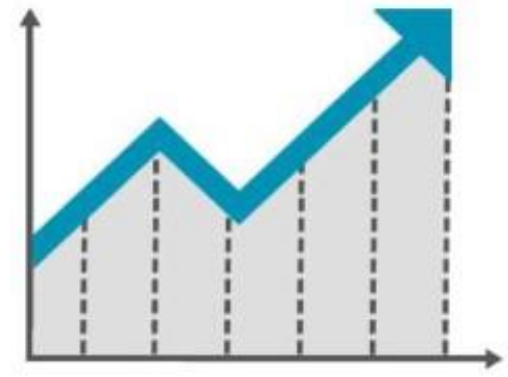
Enter appropriate details about client

5. Assume you had Fixed investment portfolio worth INR100,000. If, due to market conditions, your portfolio fell to INR 85,000 within a short period, say a month, would you: (If your portfolio has experienced a drop like this, choose the answer that corresponds to your actual behaviour.)

- Sell all of the investments. You do not intend to take risks.
- Sell a portion of your portfolio to cut your losses and reinvest into more secure investment sectors.
- Hold the investment and sell nothing, expecting performance to improve.
- Invest more funds to lower your average investment price.

Previous

Next





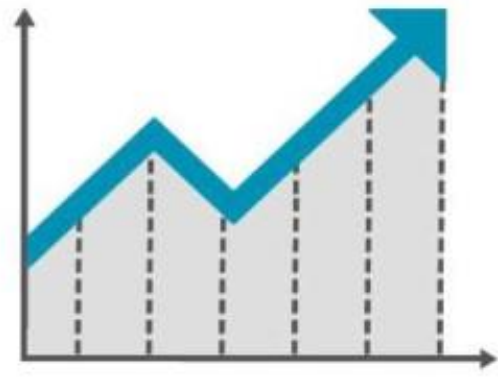
Enter appropriate details about client

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





Enter appropriate details about client

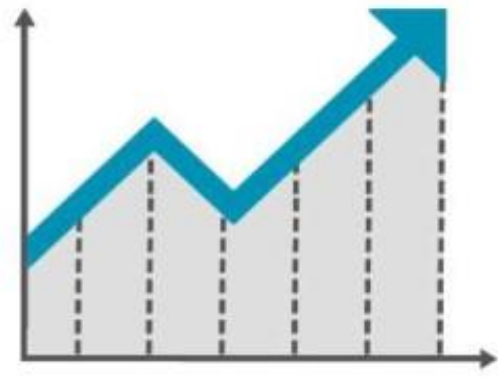
7. Apart from your home, have you ever borrowed money to make an investment?

Yes. 0 (% of your total assets)

No

Previous

Next





Enter appropriate details about client

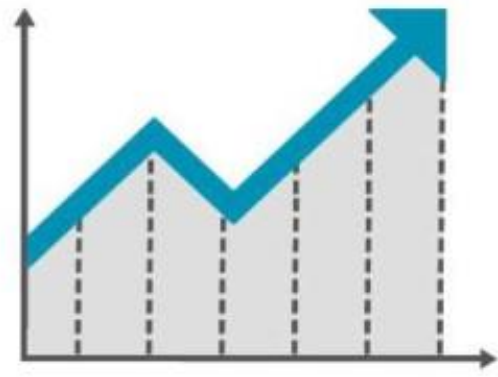
8. Would you consider borrowing money to make an investment?

Yes. The maximum level of borrowing (gearing) I am prepared to accept is % of my net assets (equity)

No

Previous

Calculate Risk Profile





Personal Details Risk Profiling

Risk Profile is
Balanced
OK

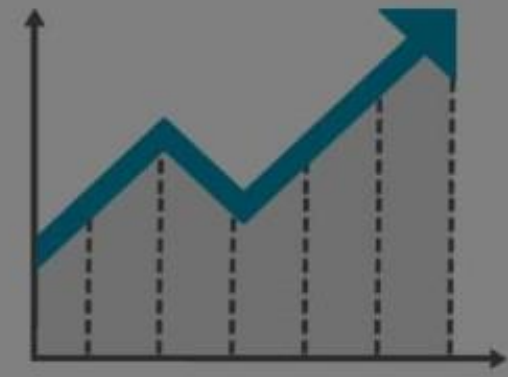
8. Would you consider borrowing money to make

Yes. The maximum level of borrowing (gearing) I am prepared to accept is
0 % of my net assets (equity)

No

Previous

Calculate Risk Profile



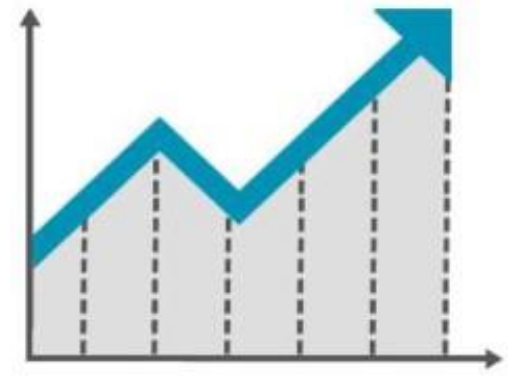


Enter appropriate details about client



Disclaimer:

- I, 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.





Personal Details

Risk Profiling

Payment

Terms and Conditions:

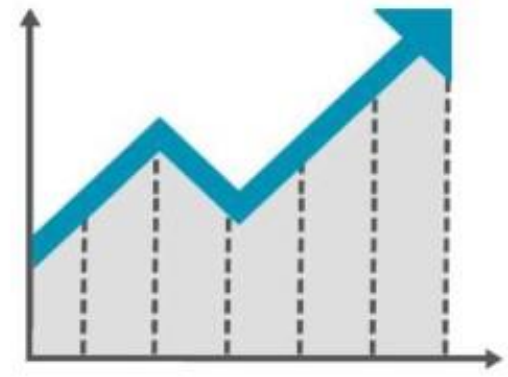
For the purpose of this document, "Purnartha" refers to Purnartha Investment Advisers Pvt. Ltd., a company incorporated under the Companies Act 1956, having its registered office at 33, Rachana, Ground & 2nd floor, Dr. Ketkar Road, Bharati Nivas Society, Off Karve Road, Erandwane, Pune - 411 004, Maharashtra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



Enter appropriate details about client for lumpsum AUM

Investment Mode:

Plan Type

Regular

SIP

Plan Period

1 Year

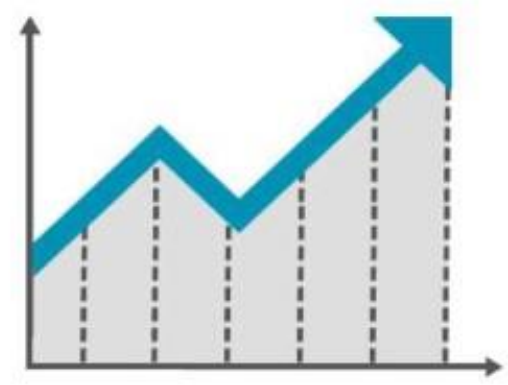
3 Years

Assets under management (AUM) *

Enter amount

Do you have Reference Code? Yes

SP00004





Personal Details

Risk Profiling



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?

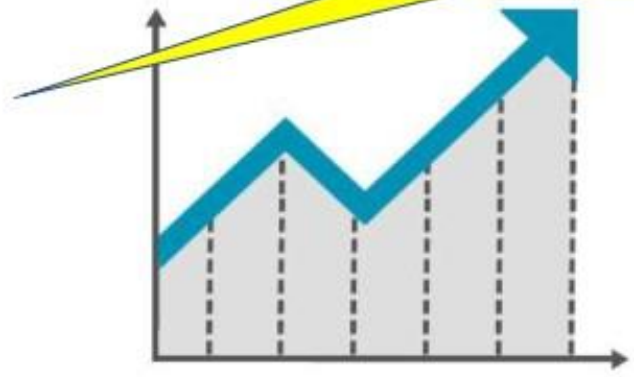
Yes

SP00004

Previous

Next

Enter appropriate details about client for SIP cases





Enter appropriate details about client's plan selection



Choose Plan:

AUM ₹ 1,00,00,000.00

*Fee's shown in following plan options are according to above AUM

Plan A

Initial Fee (% of AUM)	Hurdle Rate (Annual)	Profit Sharing (% above hurdle rate)
2.50%	25.00%	20.00%

Initial Fee to pay ₹ 2,95,000.00
(includes 18% GST ₹ 45,000.00)

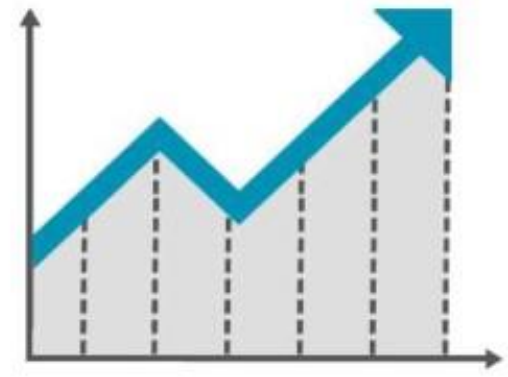
Buy

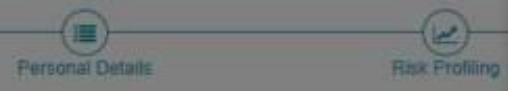
Plan B

Initial Fee (% of AUM)	Hurdle Rate (Annual)	Profit Sharing (% above hurdle rate)
2.00%	15.00%	20.00%

Initial Fee to pay ₹ 2,36,000.00
(includes 18% GST ₹ 36,000.00)

Buy





You have opted to buy Plan A

Confirm **Cancel**

Choose Plan:

AUM ₹ 1,00,00,000.00

*Fee's shown in following plan options are according to above AUM

Plan A

Initial Fee (% of AUM)	Hurdle Rate (Annual)	Profit Sharing (% above hurdle rate)
2.50%	25.00%	20.00%

Initial Fee to pay ₹ 2,95,000.00
(includes 18% GST ₹ 45,000.00)

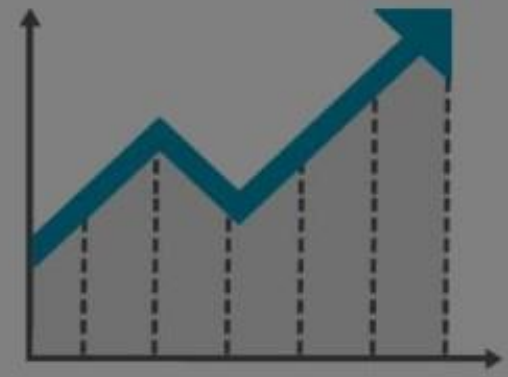
Buy

Plan B

Initial Fee (% of AUM)	Hurdle Rate (Annual)	Profit Sharing (% above hurdle rate)
2.00%	15.00%	20.00%

Initial Fee to pay ₹ 2,36,000.00
(includes 18% GST ₹ 36,000.00)

Buy





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 *	Account number *
<input type="text"/>	<input type="text" value="Enter Account number"/>
IFSC Code *	Cancelled Cheque Scan Copy *
<input type="text" value="Enter IFSC code"/>	<input type="button" value="Choose File"/> No file chosen
Payment Type	
<input type="button" value="By Cheque"/>	<input type="button" value="Other"/>

* 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.

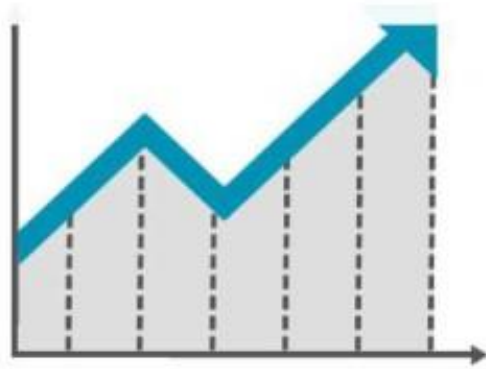
Enter appropriate details about payment to be received from client





that I am making this payment from my own account, the details of which are given below

Bank Name *	Account number *
ICICI BANK	123456789
<small>Net banking option available.</small>	
IFSC Code *	Cancelled Cheque Scan Copy *
icic0000038	<input type="button" value="Choose File"/> Purnarth...rcle.png
Payment Type	
<input checked="" type="radio"/> By Cheque	<input type="radio"/> Other
Cheque number *	Cheque Amount *
<input type="text" value="Enter number"/>	295000
Cheque Date *	
<input type="text" value="YYYY-MM-DD"/>	

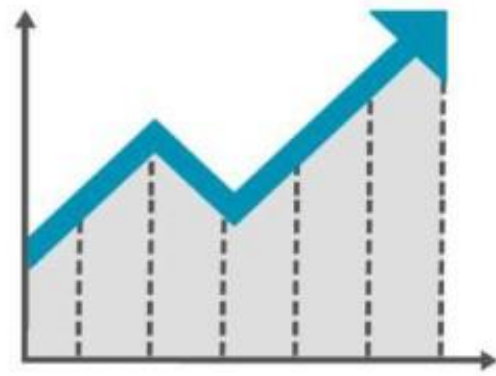


If mode of payment is by Cheque, enter details of cheque (If Sales Person/Channel Partner has already received the cheque)



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 <small>Net banking option available.</small>	Account number * 123456789
IFSC Code * icic0000038	Cancelled Cheque Scan Copy * <input type="button" value="Choose File"/> Purnarth...rcle.png
Payment Type <input type="button" value="By Cheque"/> <input type="button" value="Other"/>	



Select Other, if mode of payment is other than Cheque

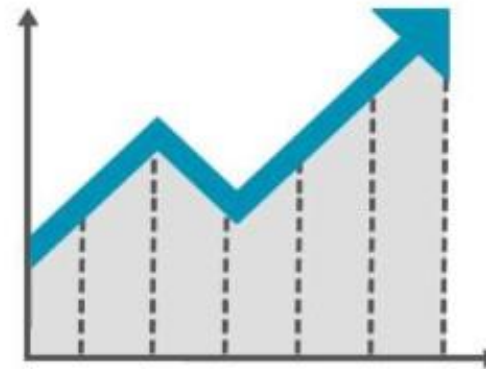
* Kindly note that, the net banking payment option is available and shall be activated for selective banks. Please click on "Proceed" for other payment options.



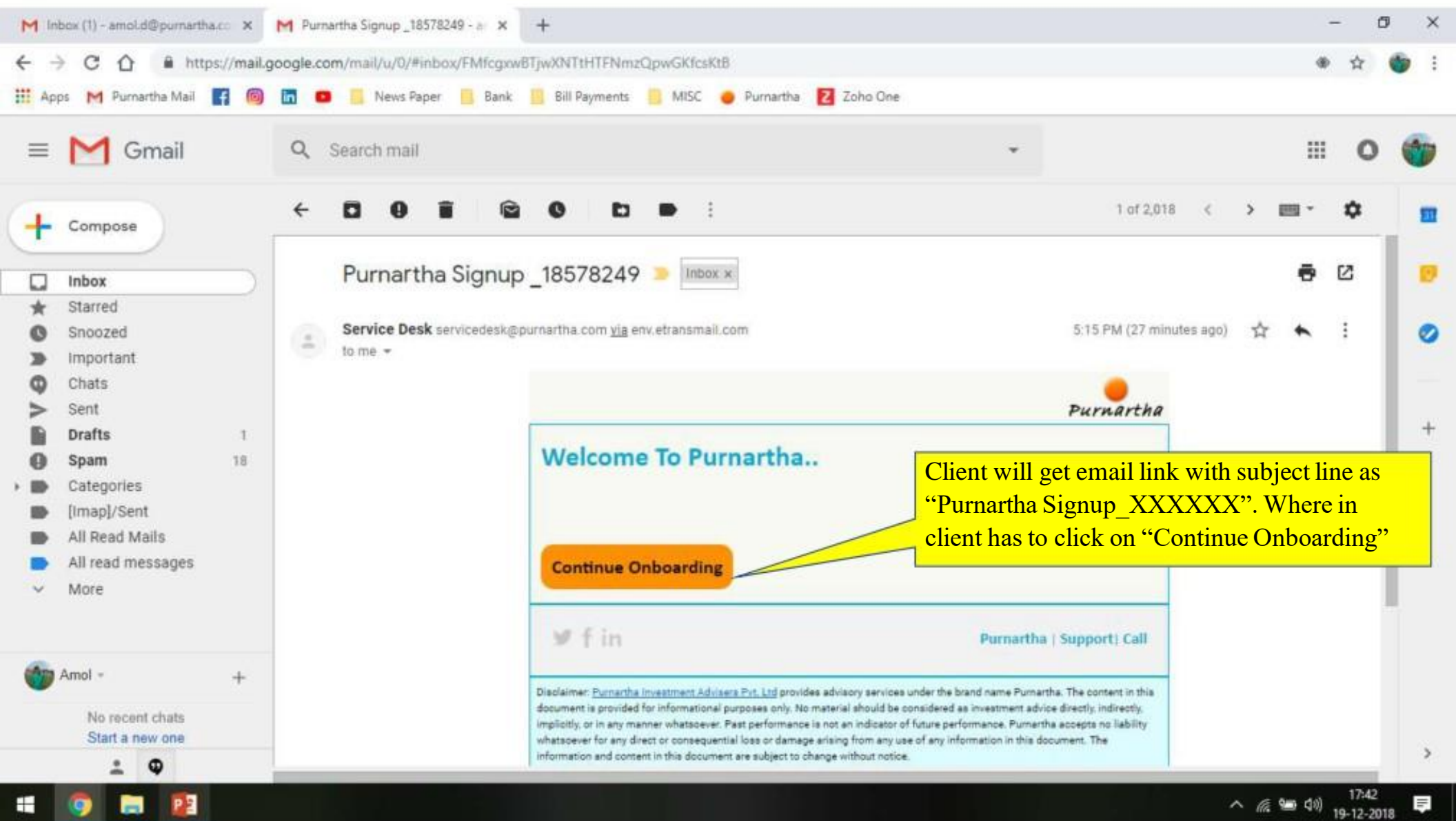
Thank you!



Client basic information has been saved successfully.
Confirmation link send to client for further process successfully.



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.



Compose

- Inbox
- Starred
- Snoozed
- Important
- Chats
- Sent
- Drafts 1
- Spam 18
- Categories
- [imap]/Sent
- All Read Mails
- All read messages
- More

Amol +
No recent chats
Start a new one

Purnartha Signup_18578249 Inbox x

Service Desk servicedesk@purnartha.com via env.etransmail.com
to me

5:15 PM (27 minutes ago)

Purnartha

Welcome To Purnartha..

Continue Onboarding

Twitter Facebook LinkedIn | Purnartha | Support | Call

Disclaimer: Purnartha Investment Advisers Pvt. Ltd provides advisory services under the brand name Purnartha. The content in this document is provided for informational purposes only. No material should be considered as investment advice directly, indirectly, implicitly, or in any manner whatsoever. Past performance is not an indicator of future performance. Purnartha accepts no liability whatsoever for any direct or consequential loss or damage arising from any use of any information in this document. The information and content in this document are subject to change without notice.

Client will get email link with subject line as "Purnartha Signup_XXXXXX". Where in client has to click on "Continue Onboarding"



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 Categorized	
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.



Update

Date of birth

2018-12-19

Update Cancel

Personal Details		
Name	MEG	Edit
Date of birth	2018	Edit
Gender	Fem	Edit
Marital Status	Unmarried	Edit
Citizenship	IN-Indian	
Occupation	Non Categorised	
Residential Status	Resident individual	
PAN	ARZPD5614K	
Aadhaar Number		
Address	test	Edit



Location, Street, City	Pune, Maharashtra, India	<input type="checkbox"/> Edit
City	Pune	
State	Maharashtra	
Country	India	
Pin code	411004	
GSTIN number		
Politically Exposed Person (PEP) / Related to a Politically Exposed Person (PEP)	No	

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.

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. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that I may be held liable for it. I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.

Confirm & Proceed



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 capacity	Moderate

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

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.



Risk Profiling

Risk Profile is **Balanced**

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8

1. Which of the following best describes your current stage of life?

- Single with few financial burdens. Ready to accumulate wealth for future short term and long-term goals.
- A couple without children. Preparing for the future by establishing a home. Expecting to have or already have a high purchase rate of household and consumer items.
- Young family with a home. You have a mortgage and childcare costs and maintain only small cash balances.
- Mature family. You are in your peak earning years and your mortgage is under control. You both work and you may or may not have children that are growing up or have left home. You're ready to start thinking about your retirement years.
- Preparing for retirement. You own your home and have few financial burdens; you want to ensure you can afford a comfortable retirement.
- Retired. You rely on existing funds and investments to maintain your lifestyle in retirement. You may already be receiving a Government pension and/or Superannuation pension.

Client have option to edit the risk profiling questionnaire.





1. Which of the following best describes your current stage of life?

- Single with few financial burdens. Ready to accumulate wealth for future short term and long-term goals.
- A couple without children. Preparing for the future by establishing a home. Expecting to have or already have a high purchase rate of household and consumer items.
- Young family with a home. You have a mortgage and childcare costs and maintain only small cash balances.
- Mature family. You are in your peak earning years and your mortgage is under control. You both work and you may or may not have children that are growing up or have left home. You're ready to start thinking about your retirement years.
- Preparing for retirement. You own your home and have few financial burdens; you want to ensure you can afford a comfortable retirement.
- Retired. You rely on existing funds and investments to maintain your lifestyle in retirement. You may already be receiving a Government pension and/or Superannuation pension.

Edit

Next

Client have option to edit the risk profiling questionnaire.



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. If 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 held responsible for any 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.



Disclaimer

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 profiling 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 asset allocation

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



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. Kefkar Road, Bharali 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 payment 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 is required 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 the "I Agree" button, 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 (performance based fee).

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



information &/or recommending a revised assent allocation

Terms & Conditions

poicies: Under such circumstances, the Purnartha will give 7 days notice through e-mail to me for amending the present contract. I further understand that, if on receipt of the notice, if I am unwilling to continue with the present contract on amended terms and conditions I shall intimate Purnartha within a period of 5 days from the date of receipt of Notice. I understand that, in case, I continue to deal with Purnartha subsequent to the receipt of such notice, it shall be deemed that I am agreeable to the new clauses and under such circumstances; such amendment shall be effective and binding on me from the date of receipt of intimation notice

10.3) Notices: Any notice or other communication of like nature that may be given by one party to the other shall always be in writing and shall be served by hand delivery duly acknowledged or sent by registered post with acknowledgement due or through e-mail and by no other mode at the respective addresses of the parties or at such other address as may be subsequently intimated by one party to the other in writing. Any such communication shall be deemed to have been served when sent by registered post when the same is actually received by the addressee. There shall be deemed acceptance of the communication in case of refusal/ evasion of service of the communication.

10.4) If any part or any provision of this contract is or becomes illegal, invalid or unenforceable, that part or provision shall be ineffective to the extent of such invalidity or unenforceability only, without in any way affecting the validity or enforceability of the remaining part of the said provision or the remaining provisions of the present contract.

IN CASE OF ANY DISCREPANCY IN ANY UPDATE/INFORMATION/SUMMARY, I SHALL ADVISE PURNARTHA WITHIN 5 WORKING DAYS.

I have read and agree with the above **terms and conditions**

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



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)	Hurdle Rate (Annual)	Profit Sharing (% above hurdle rate)
2.5%	25%	20%

I Accept


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



Bank Details

Bank Name	ICICI BANK
Account Number	123456789
IFSC Code	icic0000038

Cancelled Cheque/ Payment Cheque Scan Copy



I Accept

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



| Accept

Cheque Details

Cheque Number	123
Cheque Date	2018-12-12

| Accept

Mobile *
+919820026695

Send OTP

Submit & Proceed

Reject & Send back

Client have to check this box

Client have to click on Send OTP

Meanwhile if client is not agree the filled in information so far, he/she can click reject button here.



☑ | Accept

Cheque Details

Cheque Number

Cheque Date

☑ | Accept

Mobile *

+919820026695 ✓

Submit & Proceed

Reject & Send back

Enter rejection reason below:

Enter here..

Reject Cancel

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.



Your rejection is submitted to Purnartha. We will get back to you shortly!

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.



| Accept

Mobile Verification is mandatory

Ok

Cheque Details

Cheque Number	123
Cheque Date	2018-12-12

| Accept

Mobile *
+919820026695

Send OTP

Submit & Proceed Reject & Send back

Client have to verify his mobile no



| Accept

Cheque Details

Cheque Number	123
Cheque Date	2018-12-12

| Accept

Mobile *
+919820026695

Resend [22]

Enter OTP

Submit & Proceed

Reject & Send back

Client have to confirm OTP sent to his mobile no mentioned above.



| Accept

Cheque Details

Cheque Number	123
Cheque Date	2018-12-12

| Accept

Mobile *

+919820026695



Submit & Proceed

Reject & Send back

Once OTP is verified, client can submit the form.



| Accept

I confirm that all filled in information is correct

Cheque Details

Cheque Number

123

Cheque Date

2018-12-12

| Accept

Mobile *

+919820026695





Thank you!

End of onboarding process. Onboarding request will be generated at Purnartha.