

To  
Pushpak Finstock,  
2130-A/2, VRAJRAJ,3rd Floor,  
Near Reliance Super Market  
Atabhai Road,  
Bhavnagar.

Dear Sir / Mdm,

**Sub: Additional of segment / Exchange as trading preferences**

I / We, \_\_\_\_\_ is registered as client with your company bearing client code \_\_\_\_\_.

In view of the above and as uniform KYC already executed with you, I / We, would like to add the below mentioned segment / Exchange as preference for trading hence forth.

Sr. No.	Name of the National Commodity Exchange	Date of consent for trading on concerned Exchange	Signature of the client
1.	Bombay Stock Exchange Limited - Cash Segment		<input type="checkbox"/>

The above trading preference would be in addition to my KYC executed with you originally dated \_\_\_/\_\_\_/\_\_\_\_\_. Please make necessary modification / addition in my client master and kindly acknowledge in duplicate.

For \_\_\_\_\_ (Name of the client)

\_\_\_\_\_  
Signature of the client

Date: \_\_\_/\_\_\_/\_\_\_

Place: \_\_\_\_\_



## FATCA-CRS Declaration & Supplementary KYC Information

### Declaration Form for Individuals / Non Individuals

*Please seek appropriate advice from your professional tax professional on your tax residency and related FATCA & CRS guidance*

PAN*											
Name											
Address Type [for KYC address]	<input type="checkbox"/>	Residential	<input type="checkbox"/>	Residential / Business							
	<input type="checkbox"/>	Business	<input type="checkbox"/>	Registered Office							
Place of Birth				Country of Birth							
Gross Annual Income Details in INR	<input type="checkbox"/>	Below 1 Lakh	<input type="checkbox"/>	1-5 Lacs	Occupation Details [Please tick any one (✓)]	<input type="checkbox"/>	Business	<input type="checkbox"/>	Professional		
	<input type="checkbox"/>	5-10 Lacs	<input type="checkbox"/>	10-25 Lacs		<input type="checkbox"/>	Public Sector	<input type="checkbox"/>	Private Sector		
	<input type="checkbox"/>	25 Lacs - 1 Cr	<input type="checkbox"/>	> 1 Crore		<input type="checkbox"/>	Government Service	<input type="checkbox"/>	Agriculturist	<input type="checkbox"/>	Housewife
Net Worth in INR. In Lacs [Optional]	_____					<input type="checkbox"/>	Student	<input type="checkbox"/>	Retired		
Net Worth Date [Optional]	dd-mm-yyyy					<input type="checkbox"/>	Forex Dealer	<input type="checkbox"/> Others [Please specify] _____			
Politically Exposed Person [PEP]	<input type="checkbox"/>	Yes	<input type="checkbox"/>	Related to PEP	Any other information [if applicable]	[Please specify]					
	<input type="checkbox"/>	Not Applicable									

\* If PAN is not available, please specify Folio No(s)

Is your Country of Tax Residency other than India -  Yes  No

If 'Yes', please specify the details of all countries where you hold tax residency and its Tax Identification Number & type

S No	Country of Tax Residency#	Tax Payer Identification Number / Functional Equivalent	Identification Type [TIN or other, please specify]
1			
2			
3			

# to include all countries than India, where investor is Citizen / Resident / Green Card Hold / Tax Resident in those respective countries especially of USA

#### Declaration :

I acknowledge and confirm that the information provided above is true and correct to the best of my knowledge and belief. In case any of the above specified information is found to be false or untrue or misleading or misrepresenting. I am aware that I may be liable for it. I hereby authorize you to disclose, share, rely, remit in any form, mode or manner, all / any of the information provided by me, including all changes, update to such information as and when provided by me to / any of the Mutual Fund, its Sponsor, Asset Management Company, trustees, their employees / RTAs ('the Authorized Parties') or any Indian or foreign governmental or statutory or judicial authorities / agencies including but not limited to the Financial Intelligence Unit-India (FIU-IND), the tax / revenue authorities in India or outside India wherever it is legally required and other investigation agencies without any obligation of advising me of the same. Further, I authorize to share the given information to other SEBI Registered Intermediaries/or any regulated intermediaries registered with SEBI /RBI/IRDA/PFRD to facilitate single submission / update & for other relevant purposes. I also undertake to keep you informed in writing about any changes / modification to the above information in future and also undertake to provide any other additional information as may be required at your / Fund's end or by domestic or overseas regulators/ tax authorities. I/We authorize Fund/AMC/RTA to provide relevant information to upstream payors to enable withholding to occur and pay out any sums from my account or close or suspend my account(s) without any obligation of advising me of the same.

Date :

Signature :

Place :

