

Client onboarding process for BofA Securities India Limited (BofASI)

Step 1

- Send email to dg.indiacsteam@bofa.com with the following details of the account to be setup to initiate onboarding procedure:
 - ✓ PAN Card (Issued by the Indian Income Tax Department)
 - ✓ Trading Segment (Cash, F&O)
- Based on PAN Card, we will download the KRA / CKYCR documents (post your consent).
- Post reviewing the downloaded documents, we will share list of requirements (SEBI specified and BofASI prescribed) to be submitted for opening an account.

Step 2

- Fill in and submit the original application forms and supporting documents which include, but not limited to, KYC Application Form, Trading account details form, etc. to address as below:
 - ✓ Broker Name: BofA Securities India Limited
 - ✓ Team: India Operations
 - ✓ Address: 16th Floor, A Wing, One BKC, G Block, Bandra Kurla Complex, Bandra (E), Mumbai – 400 051, India.

Step 3

- Submitted forms and supporting documents will be verified by BofASI team.
- The BofASI team will coordinate with the designated client contact for any further clarifications / documents required, if any.

Step 4

- Post receipt and verification of the client confirmations / documents, BofASI will open the client account and register the same on the exchanges and segments, as applicable.
- Post confirmation from exchange on permission to trade, you will receive a welcome email consisting of your Unique Client Code (UCC).
- You can now start stock market trading with BofASI using the UCC shared.