

Browser based Interface to update client details in Trading and DP.

Prerequisites:

- Original Photo of PAN
- Current address should be updated in Aadhaar (Aadhaar will be the address proof).
- Aadhaar no.
- Income proof (Mandatory if derivative segments required)
- Original photo/copies of proofs wherever required like Income statement etc

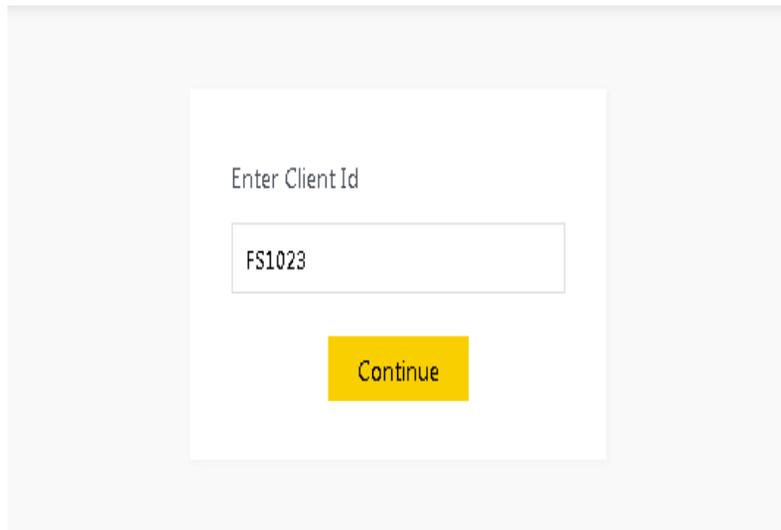
Note:

- Any modification in KRA data (Mobile No, Email Id and Address) need to be changed in DP as well. Make sure that client is Solo holder in DP Account.
- We will not able to accept application if trading account linked with DP account with multiple holders.
- For Reactivation, RM needs to go through complete reKyc process. I.e. Verification of Mobile, email, address, Segment selection, Income details etc.

Process Flow:

Login URL: <https://ekyc.way2wealth.com>

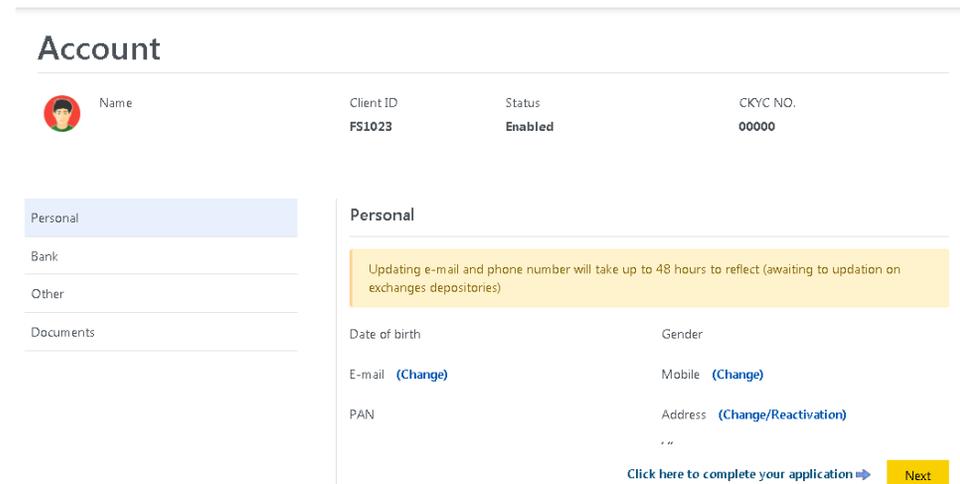
RM will enter all client related data in KYC portal.



Enter Client Id

FS1023

Continue



Account

Name	Client ID	Status	CKYC NO.
	FS1023	Enabled	00000

Personal

Bank

Other

Documents

Updating e-mail and phone number will take up to 48 hours to reflect (awaiting to update on exchanges depositories)

Date of birth

Gender

E-mail [\(Change\)](#)

Mobile [\(Change\)](#)

PAN

Address [\(Change/Reactivation\)](#)

..

[Click here to complete your application](#) [Next](#)

Select appropriate change request (Email / Mobile / Address)

To change Email – click on “Email (Change) “– select declaration and continue – enter mobile no – enter OTP - verify.

Client ID Status KYC

Personal

I/We hereby declare that the email ID being updated here belongs to me/us. Further, I authorise way2wealth Securities Ltd. / way2wealth Commodities Pvt Ltd to use this to send me any information/alert/email. This change will all left the trading and demat account that I hold with way2wealth Securities Ltd / way2wealth Commodities Pvt Ltd.

Continue

WAY2WEALTH
BROKERS PRIVATE LIMITED

SMS Verification

Enter your new mobile number

9900516546

Select Dependency

Self

Continue

WAY2WEALTH
BROKERS PRIVATE LIMITED

SMS Verification

We've send you a 4 digit code. Please check your phone and enter the code here to complete varification

3765 Verify

OTP has been sent successfully

Didn't receive the OTP? [Resend](#)

To Change Address – Select “Address change / Reactivation” and go through Digilocker process.

Share Aadhar details from Digilocker

Do not worry if you have never registered with Digilocker. Click on the button "Connect To Digilocker". Digilocker will open as a pop-up on your screen where provide your Aadhaar number and authenticate with OTP. You will then be required to set your PIN and give your consent to provide your Aadhaar document to us for KYC. Your 12 digit Aadhar number is never fetched, stored, revealed or collected. The Aadhaar and the PAN should belong to you.

Connect to Digilocker

By Clicking the above button, I agree that have read the Aadhaar user consent [document](#) and voluntarily consent to share my Aadhaar information with way2wealth for conducting KYC for opening a trading and Demat account adhering to KRA regulations (2011) and PMLA guidelines (2002).



Sign in to your account

Mobile / Aadhaar / Username

298615963014

Sign in with OTP

Don't have DigiLocker account? [Sign up](#)



Sign in to your account

Mobile / Aadhaar / Username

298615963014

Enter OTP

.....|

UIDAI has sent a temporary OTP to your mobile ending in *****6546(valid for 10 mins).

Did not receive OTP? [Resend](#)

Continue

Don't have DigiLocker account? [Sign up](#)



Enter security PIN to Sign in

Security PIN

.....|

[Forgot my PIN](#)

Submit

Way2Wealth Ekyc

Way2Wealth Ekyc would like to access your DigiLocker to:

- Get the list of issued documents.
- Download the issued documents.
- Get the list of uploaded documents and folders.
- Download the uploaded documents.
- Upload documents to your DigiLocker.
- Pull documents into your DigiLocker from issuers.
- Get your profile information (Name, Date of Birth, Gender).
- Get your e-Aadhaar data.

By clicking Allow, you provide your consent to allow this application to access your DigiLocker.

Allow

Deny

Please Verify Your Details



Suhas Hebbar

Father's Name : M N Seetharama Hebbar
D.O.B : 23-03-1981
Gender : Male
Address : #245/1 2nd floor 5th Main 1st Stage 1st phase, manjunatha nagara Bangalore North, Bangalore, Karnataka, India, 560010

Continue

Client ID	Status	CKYC NO.
FS1023	Enabled	00000

Personal

Updating e-mail and phone number will take up to 48 hours to reflect (awaiting to updation on exchanges/ depositories)

Date of birth	Gender
E-mail (Change)	Mobile (Change) * requested
PAN	Address (Change/Reactivation) * requested

[Click here to complete your application](#) **Next**

Bank Modification:

Client ID: FS1023 Status: Enabled CKYC NO.: 00000

Bank (Add bank)

Bank account modification:

Account

Bank

Previous [Click here to complete your application](#) Next

Primary bank account modification

Account Number (Required): 000201533600

Re-enter Account Number (Required): 000201533600

IFSC (Required): ICIC0000002

Account Type: Saving

I/We hereby declare that the above information provided by me, is true and to the best of my knowledge. I/We undertake to inform way2wealth Securities Ltd / way2wealth Commodities Pvt Ltd. of any discrepancies, changes, or incorrect information that I become aware of, immediately. I/We would be held liable for all such consequences/actions taken with respect to the above information. This change will affect the Trading and Demat account that I hold with way2wealth Securities Ltd / way2wealth Commodities Pvt Ltd.

Make this Default Address

Verify Details

Client ID: FS1023 Status: Enabled CKYC NO.: 00000

Bank detail noted

Bank account modification:

Account

Bank

Previous [Click here to complete your application](#) Next

Segment and Financial Details Update and document (Proof) Upload:

Client ID: FS1023 Status: Enabled CKYC NO.: 00000

Others

BSE Cash F&O Currency Commodity

Segment: NSE Cash F&O Currency Commodity

MCX Commodity

Annual Income: 5-10 Lac

Annual Income Date: 29-04-2021

Net Worth

Net Worth Date: dd-mm-yyyy

My sole country of tax residency India

I have understood the information requirements of this Form (read along with FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this form is true, correct and complete. I also confirm that I have read and understood the FATCA & terms and conditions below and hereby accept the same. Name for your account will be updates as per the Income Tax database due to Exchange regulations.

Previous [Click here to complete your application](#) Next

Specimen Image

Important Image instructions

- > Capture clear image with a sufficient light
- > Background of the image should be plain, preferably white
- > Do not use the rotated image.
- > All the details on the pan card should be clearly readable
- > Pan card should not be tampered

Continue

Client ID: FS1023 Status: Enabled CKYC NO.: 00000

Upload Documents

Pan Card: Browse... DCH_PAN.JPG

Financial Proof: Change... FinanciaLABYPW2282P_...

Signature Specimen: Change... Dch_Sign.JPG

Bank Proof: Change... DCH_CHQ.JPG

Other Document: Change... DOandDONTs.pdf

Previous [Click here to complete your application](#) Submit

Client needs to do IPV. RM needs to copy the link mentioned below and send it to client to take “Selfi”.



We have taken your details, Please share below link to your client for upload IPV image.

<https://ekyc.way2wealth.com/rekyc/user> [Copy Link](#)

Send it to your Client [f](#) [t](#) [w](#) [in](#)

Once completes request, RM will able to see the request in “Bucket” list with status “Request”.

WAY2WEALTH BROKERS PRIVATE LIMITED Home Rmlogin [Logout](#)

Enter Client Id

[Continue](#)

Bucket [Esign](#) [Complete](#) [Reject](#)

Show **10** entries Search:

Sr. No	Client Code	Action	Update Details	PAN	KYC Status	Customer Name	Mob No.	Email Change	Mobile Change	Address Change	Segment Activation	Bank Change	Complete	Generate	Export	
35	fs1021	Continue	Update Details	ABRPH8049Q	esign_pending	SUHAS HEBBAR		no	yes	no	yes	yes	Complete	Generate PDF	Export	E-sign
39	fs1023	Continue	Update Details		requested			no	yes	yes	yes	yes	Complete	Generate PDF	Export	

The current REKYC application not linked with Techexcel database. So RM needs to enter mandatory data like client name, PAN, Father name etc.

Click on update details – update BASIC and OTHER details – Save application.

Basic Address Bank Other

1981-03-23

Email Id
suhas.dch@gmail.com

New Email Id
suhas.dch@gmail.com

Mobile Number
9900516546

New Mobile Number
9900516546

Pancard
ABRPH8049Q

Geo Location
{latitude: 29.931018, longitude: 78.1235123}

Next

PAN Client Image Signature Image Address Proof (Permanent) Bank Proof Financial Proof Other Document

Document Type: PAN

Reject Remark:

Reject

Rotate



Signature

*Copyright All Rights Reserved

Save Application

RM need to update these data from Techexcel:

Basic:

- Name
- Father Name
- Mother Name
- Marital Status
- Gender
- DOB
- Email Id (old email id as in Techexcel)
- Mobile no (old mobile no as in Techexcel)
- PAN No.

Other:

- DP Code (Demat account details)
- Occupation
- Select (DP/Trading) – Request type [Trading / Dp/ Both]
- Selection (Reactivation/ Information Updation) – Reactivation requires mobile, email, address verification along with Financial details and segment selections.

Once application verified by HO client will receive mail to do esign. RM can see the status as “esign_pending” and “E-sign” button will be available for RM to do the esign for client.

Bucket: Esign Complete Reject

show 10 entries

Search:

Sr. No	Client Code	Action	Update Details	PAN	KYC Status	Customer Name	Mob No.	Email Change	Mobile Change	Address Change	Segment Activation	Bank Change	Complete	Generate	Export	
35	fs1021	Continue	Update Details	ABRPH8049Q	esign_pending	SUHAS HEBBAR		no	yes	no	yes	yes	Complete	Generate PDF	Export	E-sign
39	fs1023	Continue	Update Details	ABRPH8049Q	esign_pending	SUHAS HEBBAR	9900516546	no	yes	yes	yes	yes	Complete	Generate PDF	Export	E-sign
40	fs1024	Continue	Update Details	ABRPH8049Q	esign_pending	G S SHRIDHAR		yes	yes	yes	yes	yes	Complete	Generate PDF	Export	E-sign

This will completes modification/reactivation application submission process.