



Brokerage Free

Zerodha Authorized Person

Client Details Form

Affix photo
and sign across
it

1. Date: _____
2. Name: _____
3. Father / Spouse Name: _____
4. Mother Name: _____
4. Gender: _____ 5. Nationality: _____ 6. Marital Status: _____
7. Status: RI/NRI/Foreign National (tick) 8. PAN #: _____
9. Contact #: _____ Alternate Contact #: _____
10. Email: _____ Alternate Email: _____
11. Address

12. Gross annual income : Below 1 lac/1-5 lac/ 5-10 lac /10-25 lac / above 25 lac(tick)

13. Occupation : _____

14. Bank account details (Primary Bank)

Bank name : _____

Branch Address: _____

Bank account number: _____

MICR NO: _____ IFSC CODE: _____

15. Bank account details (Secondary Bank)

Bank name : _____

Branch Address: _____

Bank account number: _____

MICR NO: _____ IFSC CODE: _____



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Feedback Form

- Support team provided adequate information on the account opening process, documents required, and account opening charges :

Bad	OK	Good	Very good	Excellent
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- Forms Pick up service, co-ordination with the executive was useful and helpful

Bad	OK	Good	Very good	Excellent
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|--|--------|-----|----------|
| • Do you trade in BSE? | | Yes | No |
| • What segments do you trade in BSE? | Equity | FNO | Currency |
| • Do you have any two wheelers? | | Yes | No |
| • Do you have any four wheelers? | | Yes | No |
| • Likely to invest in mutual funds in the next 6 months? | | Yes | No |
| • Likely to take an insurance policy in the next 6 months? | | Yes | No |
| • Likely to avail home loan or personal loan in 6 months? | | Yes | No |
| • Interest to have tips/advisory services? | | Yes | No |
| • Need Income-Tax filing services? | | Yes | No |

Discounts and incentives from Brokerage Free

Avail **100% discount of account opening charges** at Zerodha, by renewing your four wheeler insurance through Brokerage Free – Contact 0427-4302007 for more details.

Avail a **cash back of Rs. 300/-** towards your trading account charges for Zerodha account – if you meet any of the following criteria:

- Turnover of Rs. 5 Lakhs in any of the BSE segments in the first 30 days of your account opening
- Turnover of Rs. 10 Lakhs in any of the BSE segments in the first 90 days of your account opening
- Turnover of Rs. 15 Lakhs in any of the BSE segments in the first 180 days of your account opening



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References to be mapped under your Zerodha Client ID

Sl. No	Name	Mobile	Email Address

Comments to improve our service to you

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DECLARATION:

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.

Signature

Form Pickup Executive	Date/Time of Pickup	Signature of Executive