

STEP BY STEP GUIDE

HOW TO OPEN DEMAT ACCOUNT IN ZERODHA?



PROCEDURE BY

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Are you looking to open demat account in Zerodha? Here you know step by step process with images to open demat account online or offline. Know **How to Open Demat Account Online with Zerodha** and follow the 9 steps as below.

- Step 1: Fill Basic Details
- Step 2: Set New Password
- Step 3: Enter Pan Card Details
- Step 4: Pay Account Opening Charges
- Step 5: Create Digilocker
- Step 6: Fill your KYC Details
- Step 7: Upload your Documents
- Step 8: E-Sign with Aadhar Number
- Step 9: Get CLIENT-ID and Password in Email

Steps to Open Demat Account Online With Zerodha:

Step 1: Please fill below Basic Details

Enter your Full name (as per your Pan Card), Mobile No, Email Id.

Step 2: Set your New Password

Once you submitted the details click below link and Set your New Password.

Once your Details Enter you will received call from Zerodha Representative. He will fix appointment with you as per your suitable time and he will collect all documents and form signed by you. Your account will be online in 3-4 working days.

If you want to Open Account Online – do it your self-account without help of any.

You will received new password on your registered email id. Click on that link and set new password.

Step 3: Enter Pan Card Number & DOB

Enter Pan Card Number &DOB (Date of Birth Details)with help of that will fetch your details are you KRA register or not?

Step 4: Pay Account Opening Charges

Pay account opening charges using Net banking or Debit / Credit Card

Equity – 300 Rs

Commodity – 200 Rs

Step 5: Create Digilocker

If you are not register with KRA or if you already register with KRA you will be redirect directly to Zerodha Account Opening Process form Details.

If you are not KRA register that you need to create digilocker account process as per follow

Enter your Aadhar Card Number you will received OTP in the your mobile which is register with Aadhar Card

Step 6: Fill your KYC Details

Primary Bank Details

Mother name

Father name

Marital Status

Trading Exp

Once your Digilocker process completed you will redirect here. Fill your KYC details and Basic Background information

Step 7: Upload your Documents

Which is required for account opening process

- Cancel Chq
- Bank Statement
- Income Proof
- Signature Copy
- If KRA not completed then required original Pancard copy

Step 8: E-Sign with help of Aadhar Number

Time to E-Sign with help of Aadhar number : you will received OTP on your Aadhar Linked Mobile no. and Email id.

Step 9: Receive your CLIENT-ID and Password

You will receive the completely filled application form and other details on your registered email address. Next, you will receive your CLIENT-ID and Password after a day of registration with the instructions on how to log in.

In the same email, you will receive documents on Power of Attorney (POA) and nomination (in case you want to make a nominee for your account). You need to take the print out of the documents, fill it and send it to the following address.

- [Zerodha Ahmedabad](#)
- [Zerodha Delhi](#)
- [Zerodha Mumbai](#)
- [Zerodha Rajkot](#)
- [ZerodhaBanglore](#)

Are you Planning to Open Zerodha Account Offline you will need following documents

Account opening cheque favoring “Zerodha” for

- Rs. 300 – If only Trading Account (Rs.200 each, if you’ve printed the forms on your own)
- Rs. 300 – If only Commodity Account (Rs.200 each, if you’ve printed the forms on your own)
- Rs.400 – If Trading+Demat Account (Rs.300 if you’ve printed the forms on your own). AMC for Demat Account is Rs. 1000 which is collected at the end of the year

For Open Individual Demat Account Documents Requirement:

1. Pan Card – Pan Card is Compulsory to open Demat Account in India.
2. Proof of Identity : (Any of Below Documents)

- Passport
- Voter ID Card
- Driving Licence (Valid)
- Any Government Identity Card with Photo provided by Central Government or State Government
- Aadhar Card

3. Proof of Residential Address (Any of Below Documents)

- Bank Statement with latest Entry
- Passport
- Valid Driving Licence
- Voter ID Card
- Telephone Bill
- Electricity Bill
- House Tax Bill
- Proof of Address provided by Central Gov. or State Gov.

Photograph of Account holder fixed in Account opening form with
Cross sign

Duly filled with required details and sign of all account holder or
Sign and seal of Karta (in – HUF)

For Open H.U.F. Demat Account Documents Requirement:

1. PAN CARD COPY:

- Pan Card Copy of HUF.
- Pan Card Copy of Karta.
- Pan Card Copy of Co-Parcener

2. ADDRESS PROOF COPY:

- Address proof Copy of HUF.
- Address Proof Copy of Karta

3. INCOME PROOF COPY:

- Bank Passbook/Statement of HUF Indicating its existence.

4. Aadhaar of the Karta.
5. Duly filled [Trading & Demat](#) / [Commodity](#) form with photograph of Karta affixed and signed across.
6. Duly filled [HUF Declarations](#).

Important Points:

- Karta seal/stamp is mandatory on all the signature fields and on all the proofs provided.
- Karta should sign the Account Opening Form and other documents under the stamp of HUF.
- All KYC documents to be attested by the Karta.

For Open Partnership firm Demat Account Documents Requirement:

1. Individual KYC form filled and signed by each partner (Partners have to sign without the stamp on individual KYC's and supporting docs)

2. PAN CARD COPY:

- PAN Card copy of the Firm.
- PAN Card of all Partners (Attested by Each Individual Partner).

3. ADDRESS PROOF COPY:

- Address Proof copy of the Firm.
- Address Proof copy of all the partners (Attested by Each Individual Partner).

4. INCOME PROOF COPY:

Proof of Bank Account (Specimen copy of cancelled check leaf/Bank Statement/Bank Passbook/Letter from Bank).

- Copy of Balance Sheet of the Partnership Firm for the last 2 Financial Years* (to be submitted every year) if the firm is newly incorporated then, net worth certificate from CA. (The balance sheet should have the seal and signature of the Authorized Signatory on all the pages)
- [Declaration](#) for IT returns if it's a new firm.

5. Duly filled copies of [Trading & Demat](#) / [Commodity](#) form with photograph of Authorized Signatory affixed and signed across.

6. Copy of Certificate of Registration (For Registered Partnership Firms only)

7. Copy of the Partnership Deed duly attested by a notary public (investment clause must be mentioned). The first 3 pages of the partnership deed (on all pages if lesser) should have the seal and signature of the Authorized Signatory.

8. Aadhaar of the Authorized Person as per the Letter of Authority in the letterhead of the firm.

9. Duly filled [annexures](#).

10. FATCA Declaration.

Important Points:

- Partnership Deed should allow the Firm to trade in Secondary Markets.
- Authority Letter in favor of Managing Partners should be on Letterhead of the Firm.
- All the documents need to be signed by the Managing Partner
- Seal of the Partnership Firm to be put where signatures are made.
- *In case of a new Partnership Firm, provide Balance Sheet after close of immediate Financial Year.
- ** The Bank proof should contain the Bank name, Branch address, IFSC/MICR code, Name of account holder, Account number.

For Open Company Account Demat Account Documents Requirement

1. PAN CARD COPY:

- Pan Card Copy of the Company.
- Pan Card Copy of all the Authorised Signatories or Whole time Directors.

2. ADDRESS PROOF COPY:

- Address Proof Copy of the Company.
- Address proof of Authorised Signatories or Whole time Directors.

3. INCOME PROOF COPY:

- Proof of Bank Account (Specimen copy of cancelled check leaf/Bank Statement/Bank Passbook/Letter from Bank).
- Copy of Balance Sheet of the Corporate Firm for the last 2 Financial Years* (to be submitted every year) if newly incorporated then net worth certificate from CA. If it's a new company, an [ITR declaration](#) is needed. (The balance sheet should have the seal and signature of the Authorized Signatory on all the pages)

4. Any Limited Company falls under this category. AMC on the Demat account for a corporate account is Rs.1000/-
5. Duly filled [Trading & Demat / Commodity](#) form with photograph of Managing Partner affixed and signed across.
6. Aadhaar of the Authorized Person as per the Board Resolution. This person may be a Manager/Director or any person as authorized by the Company in the Board Resolution.
7. Certificate of Incorporation
8. Copies of MoA and AoA. The first 4 pages of the MOA & AOA should have the seal and signature of the Authorized Signatory of the company.
9. Form 32 (In case the names of present Directors do not appear on the MOA/AOA)
10. Duly filled [annexures](#).
11. Board resolution.
12. Photographs of Individual Promoters holding control – either directly or indirectly.
13. FATCA declaration.
14. Individual KYC form filled and signed by each director (Directors have to sign without the stamp on individual KYC's and supporting docs)

CONTACT US

Address : 28, General Bank Chamber
Opp Municipal Market
Above kotak Bank
C.G.Road ,Ahmedabad India
Gujarat 380009

Phone : 07940325797



Website : www.investalign.in