EquiAll
An Equity advisory service for everyone

HDFC BANK
We understand your world

Form No.

CAMS Code:

Registration Form for *EquiAll*

1*. **Customer Identification No. :**

2*. **HDFC Bank account No. :**

3 **Personal Details**

- Title: ☐ Mr. ☐ Ms. ☐ Others _______________
- Name: DOB : d d m m y y y y
- Mailing address:
- **Email ID*** :
  (The email address should be written clearly and in BLOCK LETTERS)
- Status of Applicant:
  ☐ Individual ☐ HUF ☐ NRI ☐ Others
- Occupation:
  ☐ Service ☐ Professional ☐ Business ☐ Housewife ☐ Retired
- Contact Details: (R) (O)
  (Mobile)

4* **Payment/Bank Details :**

Cheque no.: Bank Name & Branch

Amount (Rs.)

5* **Type of Portfolio :** ☐ Aggressive ☐ Conservative

6 **What is your current wealth and asset allocation?**

- Total Value of current wealth Rs. _________________
- Current asset allocation - Give approx. break up in % terms.
  - Savings account & Fixed Deposit with banks _________%
  - Bonds & Debt Mutual Funds _________%
  - Equity & Equity Funds _________%
  - Insurance _________%

7* **Direct Equity Portfolio Size**

- Planned investment in direct equity Rs. _________________
- Current investment in direct equity Rs. _________________

8 **Please attach your current Demat A/c statement OR the details of your current direct equity portfolio, (if any).**

Sr. No.	Stock	Quantity	Sr. No.	Stock	Quantity
1			11		
2			12		
3			13		
4			14		
5			15		
6			16		
7			17		
8			18		
9			19		
10			20		

(* - Fields are Mandatory)

For Office Use Only

Promotion Code ……………………………………

Date of form despatched to CPU ……………………………………

NRI Status ☐ Y ☐ N

Demat Account Number ……………………………………

HSL Account Number ……………………………………

Branch Dummy Account ……………………………………

EquiAll Dummy Account ……………………………………

Verification

All supporting documents and customer details required for the given promotion code is provided and hereby verified.

Branch Manager Name ____________________

Branch Manager Signature ____________________

Acknowledgement Slip

Form No.

Name:

Date:

Cheque no.:

Branch Name:

Terms and Conditions:

1. The services offered will be provided on a non-recourse basis and is purely Advisory in nature. HDFC Bank shall not, under any circumstances, accept or agree to accept any funds from you for management.

2. The product will offer Initial restructuring of portfolio through electronic mail (email), recommendations based on profile (conservative / aggressive) through email, as & when it comes and monthly mailers on model portfolio. All the communications from HDFC Bank will be only from the following e-mail id- equiall@hdfcbank.com. If no portfolio is provided with the registration form, the investor can refer to the model portfolio. At no time subsequent to the initiation of the service will there be a restructuring of the portfolio. The portfolio, recommended initially, will not be tracked on an individual client basis; except as a model portfolio. The client will have to use the model portfolio and recommendations to make changes to his/her portfolio.

3. The advise on portfolio will be offered solely through the Internet and there will be no other interaction. All communication will be to only one email id, that is specified in the registration form. More than one e-mail ids cannot be specified. Change in e-mail ids will need to be communicated to equiall@hdfcbank.com atleast 7 days in advance. HDFC Bank is not responsible for mails bouncing back from the specified e-mail id due to lack of space in the mailbox, interception of e-mails or any other reasons.

4. It is clearly understood and agreed by and between us that, while we provide you with the said Services, it will not in any way mean and be construed that we have been in any way involved in any of your decision making process to invest in any security/shares etc. The decision (if any) will be taken by you solely in your sole and absolute discretion and it is not obligatory/necessary for you to act on our advise or apprise us of your actions at any time whatsoever.

5. These services, therefore, cannot be in any manner termed or construed as management of your portfolio.

6. AND we shall not be held responsible in any manner whatsoever for the consequences resulting from your taking the decision based on our Research Based Advise and investing your funds in various securities.

7. The advise given by the bank is based on the specific risk profile of the customer. The bank reserves the right to take contrary positions with regard to its own portfolio or that of any customer as it may deem fit and will not be liable for any such action.

8. We agree to provide the said services for a period of one year subject to realisation of cheque.

If the above terms and conditions are acceptable to you, please indicate / endorse your acceptance by signing, which will be deemed as acceptance of the above terms and conditions by you, in totality.

Signature of Sole Holder

Date:

Place: