

**AMFI Registered Mutual Fund
Distributor – ARN 328260**

Account Registration – Android App



**Investment
COMPASS**

Navigating the Financial Journey

Bankim A Parikh

M. No – 9898031459

Email ID: theinvestmentcompass@gmail.com

- Account Registration will be done via NSE Invest (Mutual Fund Transaction Platform by National Stock Exchange (NSE))
- Once you fill the required details, you will get the approval link on mail.
- Do check and verify the information and approve account registration via Mobil/Email OTP
- Please find the following steps and required details for account registration
- Required information for registration – Email ID, Mobile Number, PAN Card, Bank Details, Address
 - Nominee Information: Email, Mobile number and PAN Card

3:12

Signal strength icon

Battery icon 17%



Full Name (As per PAN)*

Gender*
Select Gender

Date of Birth*
Calendar icon

PAN number*

Tax Status*
Individual

Mobile Number*

Email Address*

Password*
Info icon Eye icon

Confirm Password*
Info icon Eye icon

Save

Android navigation bar icons

Select Holding Pattern – Single/Joint

3:15

Signal 5G



Client Profile Preview

Holding Nature Details

Mode of Holding*

Select Mode of Holding

Select Mode of Holding

Single

Either or Survivor

Save

3:16 5G



Client Profile Preview

Holding Nature Details

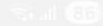
Mode of Holding*
Single

First Holder PAN*
[REDACTED]

Date of Birth*
21/06/1990

Save

Verify Basic Details

3:17  



First Holder Basic Details [EDIT](#)

Name as per PAN*
John Smith dummy

Gender*
Male

First Holder PAN*
[Redacted]

Mobile Number
[Redacted]

Email Address*
[Redacted]

Date of Birth*
21/06/1990

Tax Status*
Individual

Please Note : Name should match as PAN,
otherwise it could lead to rejection in
Transactions.

3:18 33

 **First Holder FATCA Details** [EDIT](#)

Tax Resident*
Indian

Politically Exposed*
NO

Occupation*
Occupation

Income Slab*
Income Slab

BirthCountry*
India

Address Type*
Residential

Place of Birth*

Source Of Wealth*
Select Source Of Wealth

Other Details

Relationship with Mobile no. Holder*
Relationship

Relationship with Email Holder*
Relationship

3:17

Signal 86



Bank Details

 **EDIT**

IFSC Code*

Select Bank*
Select Bank

Branch*

Account Number*

Account Type*
Select Account Type

MICR Code

3:17

Signal strength, Wi-Fi, and battery icons

66



Address Details

 **EDIT**

Address*

PIN Code*

City*

State*
Select state

Country*

Nominee Details – Optout Declaration



Nominee Details

Minor and Guardian can not be same. Guardian can not be account holder of UCC

OPT IN OPT OUT

First Nominee Name*

First Nominee Allocation*

Nominee Email*

Address 1*

Address 2

Address 3

Relationship With Account Holder*
Select Relationship

Nominee ID number*

Nominee names/Registration Status in SOA*
Select Registration Status in SOA

PIN Code*

Alert!

I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our Mutual fund account and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my Mutual fund account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the folios of AMCs.

Okay

Nominee Details – Opt in – Fill Nominee Details

Select “Yes” in Registration status in SOA





Nominee Details 

Minor and Guardian can not be same. Guardian can not be account holder of UCC

OPT IN

OPT OUT

First Nominee Name*	Date of Birth* 	Relationship With Account Holder* Select Relationship ▼
First Nominee Allocation*	Nominee Identity Type* Select Nominee Identity Type ▼	Nominee ID number*
Nominee Email*	Nominee Mobile*	Nominee names/Registration Status in SOA* Select Registration Status in SOA ▼
Address 1*		
Address 2		
Address 3		PIN Code*

▼ BOTTOM

▲ TOP

Submit

Nominee Details  EDIT

Minor and Guardian cannot be same.
Guardian cannot be account holder of UCC

OPT IN

OPT OUT

Kindly provide Nominee Details (OPT IN / OPT OUT)

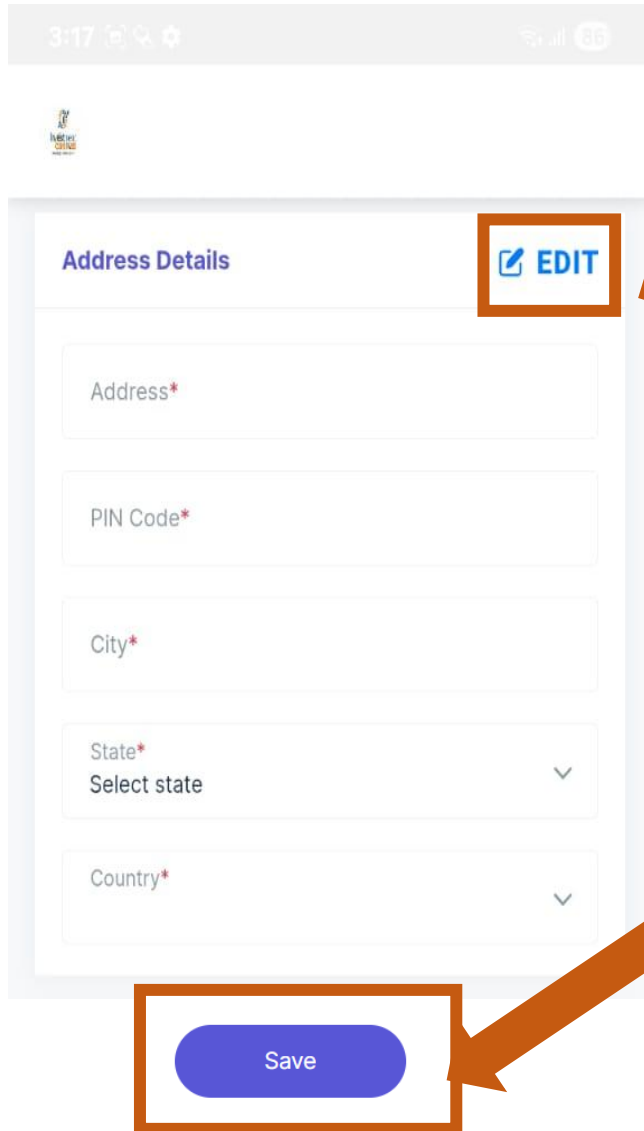
☒ I/we hereby agree with [Terms & Conditions](#).

Submit

|||

○

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3:17 [Signal] [Battery]

Investment COMPASS

Address Details EDIT

Address*

PIN Code*

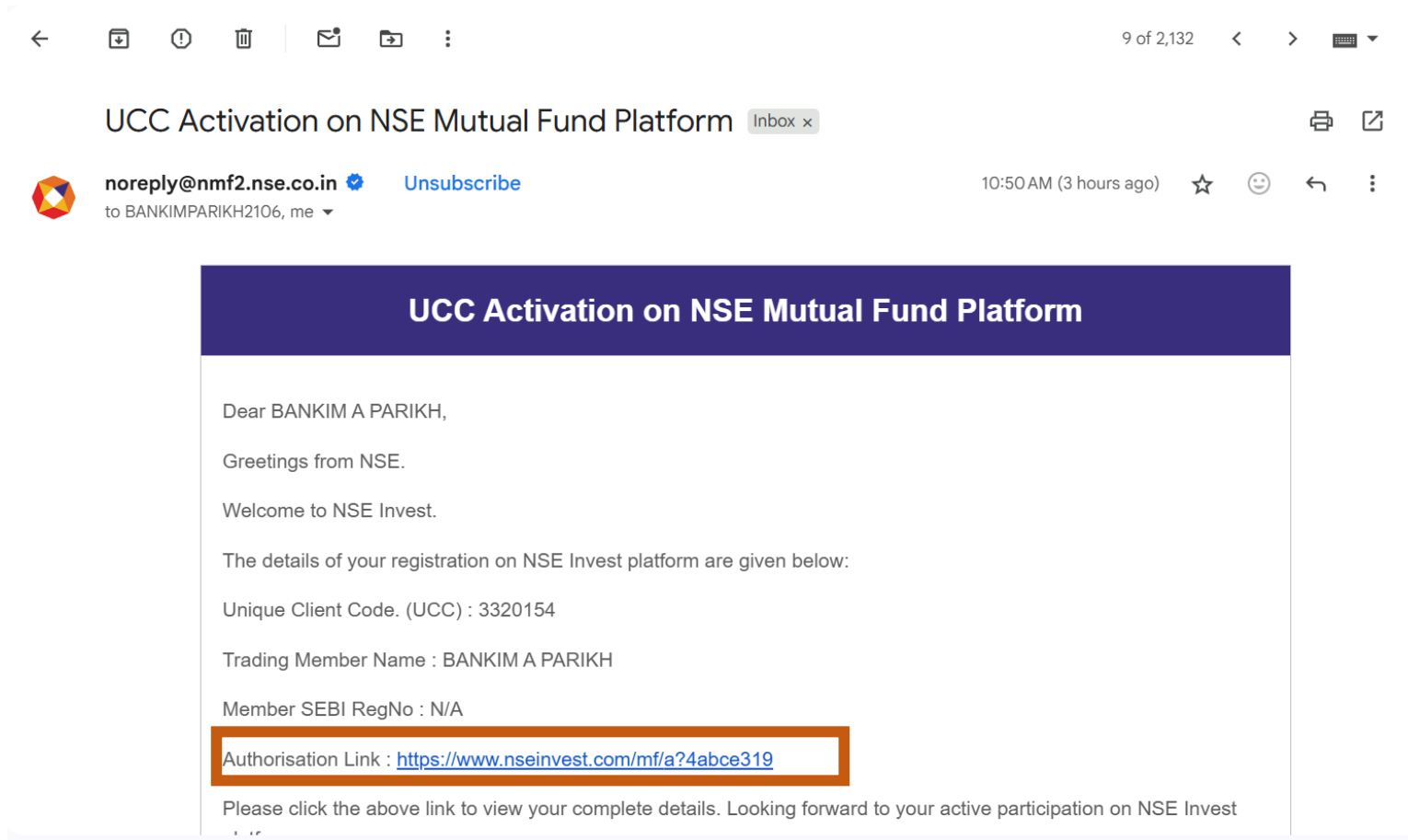
City*

State*
Select state

Country*

Save

Each section has edit button to enter the details – and save the details



Click on the given link in the mail.

It will redirect to NSE Invest and will ask for Email/Mobile OTP

Generate and enter OTP to Authenticate via any mode

UCC will be generated. And Activation mail will be sent to your registered mail ID.