

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

Account Registration



**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



< Create your account

Please enter your detail to create account.
Details once entered cannot be changed later.

Full Name (As per PAN)*

Gender*
Select Gender



Date of Birth*



PAN number*

Tax Status*
Individual



Mobile Number*

Email Address*

Password*



Confirm Password*



Save

Select Holding Pattern – Single



Holding Nature Details

Mode of Holding*

Single

▼

First Holder PAN*

Date of Birth*

28/04/1991

📅

Investment
COMPASS
Navigating the Financial Journey



First Holder FATCA Details

Tax Resident*

INDIA

Politically Exposed*

NO

▼

Occupation*

Business

▼

Income Slab*

> 1 <=5 Lacs

▼

BirthCountry*

India

▼

Address Type*

Residential

▼

Place of Birth*

AHMEDABAD

Source Of Wealth*

BUSINESS INCOME

BUSINESS INCOME

▼

Other Details

Relationship with Mobile no. Holder*

Self

▼

Relationship with Email Holder*

Self

▼

Save



Investment
COMPASS
Navigating the Financial Journey



Bank Details

×

IFSC Code*

Select Bank*

Select Bank

▼

Branch*

Account Number*

Account Type*

Select Account Type

▼

MICR Code

Save



Investment
COMPASS
Navigating the Financial Journey



Address Details

Address*

PIN Code*

380007

City*

Ahmedabad

State*

GUJARAT

Country*

India

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

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

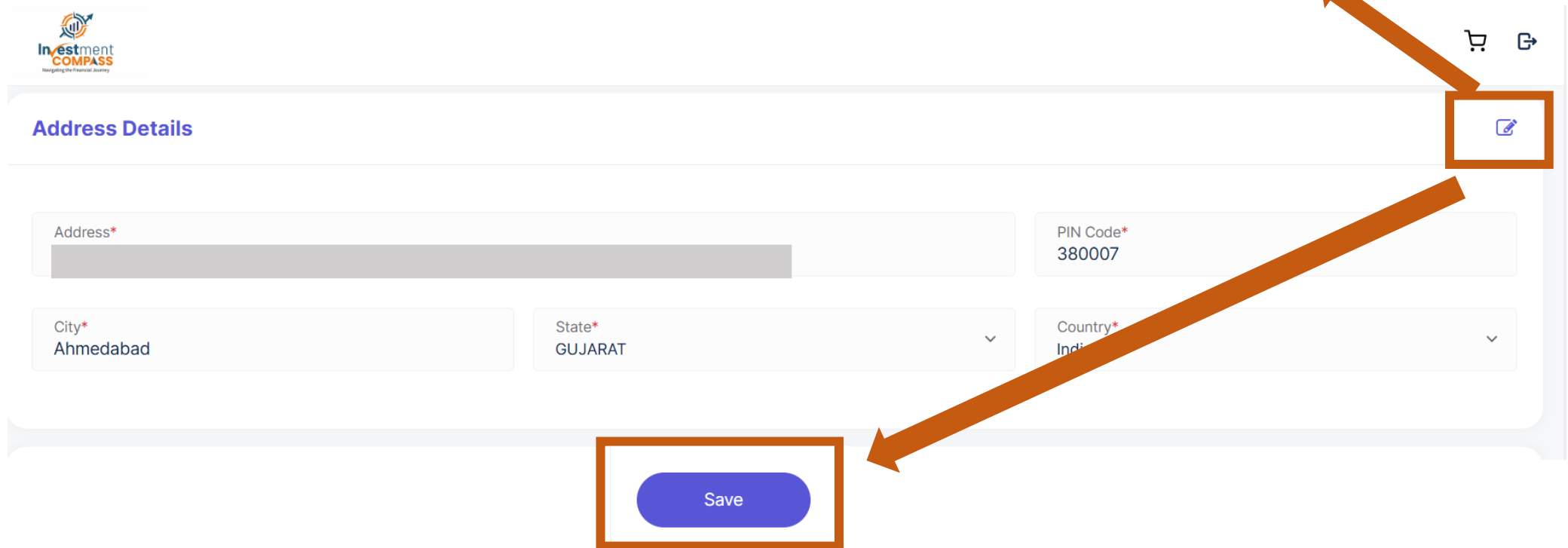
Submit



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

Submit

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



The screenshot shows the 'Address Details' section of the Investment COMPASS interface. The form includes fields for Address*, PIN Code* (380007), City* (Ahmedabad), State* (GUJARAT), and Country* (India). An edit button (pencil icon) is located in the top right corner of the form, and a Save button is at the bottom center. Two orange arrows point from the text above to these buttons: one to the edit button and one to the Save button.

Address Details

Address*
[Redacted]

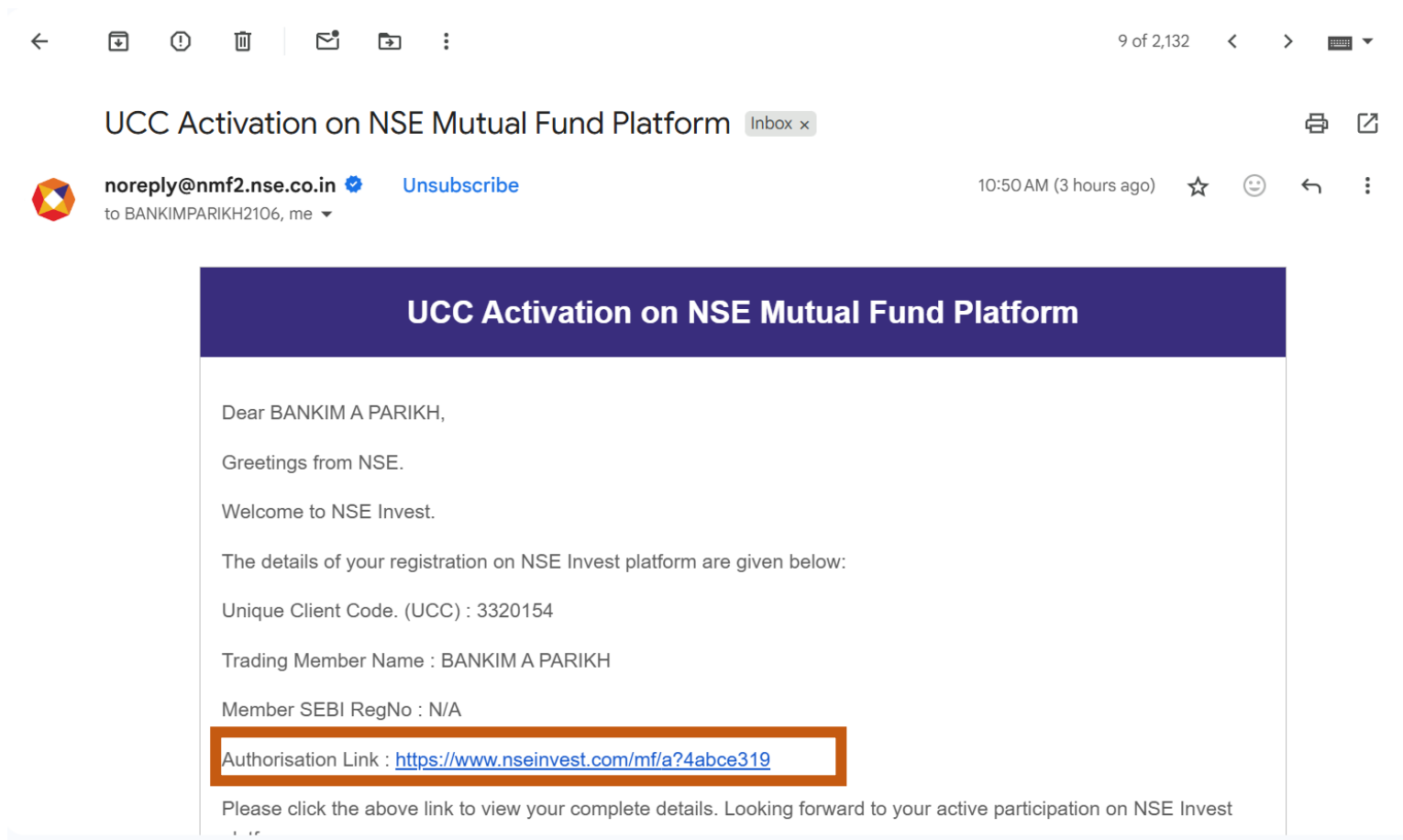
PIN Code*
380007

City*
Ahmedabad

State*
GUJARAT

Country*
India

Save



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.