

Trading account Conversion form

Date: ____ / ____ / _____

To,

Kotak Commodity Services Pvt. Ltd.
1st Floor, Nirlon House
Dr. A. B. Raod, Worli
Mumbai 400 030.

Dear Sir / Madam,

I/We request you to process: (Tick any one of the following)

- A) Online Trading A/c to Offline Trading A/c B) Offline Trading A/c to Online Trading A/c

A) Online Trading A/c to Offline Trading A/c

I/We _____, Client code _____ having online trading account facility with Kotak Commodity Services Pvt. Ltd., would like to switch from Online trading to Offline trading facility. Please do the needful.

Clients Signature:



B) Offline Trading A/c to Online Trading A/c

I/We _____, Client code _____ having an offline trading account facility with Kotak Commodity Services Pvt. Ltd., would like to switch from Offline trading to Online trading facility. In this regard, request you close my Offline A/c and allot me a new Online A/c.

I/we hereby undertake that:

1. I/We have completed all the KYC formalities including signing the Member client agreement and submitted all the required documents thereof (Proof of Identity, Address Proof, Bank Proof, PAN, etc.), at the time of opening the trading account originally and enrolling as a client under client code _____ with you .
2. There are no changes in respect of my/our Address, Bank account and PAN details as provided to you earlier with KYC form and subsequently. Further, there is no change in the other information provided to you in KYC Form and subsequently. In case of any change in the above mentioned information, I/we shall update the same to you at the earliest.

OR

There is a change in my /our Address/Bank account/PAN details; hence duly filed KYC Form along with requisite proofs is enclosed herewith.

OR

There is a change in email id and /or other information; I/we enclose herewith an updation request for the same. (Please strike off whichever is not applicable)

3. I/We enclose herewith updated financial information along with requisite proof.
4. I/We will continue to be responsible for all the trades done in my Offline Account _____.

I/We declare that the information given above is true to my/our knowledge. I/We, therefore, request you that the requirement of fresh KYC may not be insisted upon. Further, I/We agree to transfer the balance lying in my/our old code, if any to the new client code allotted for online trading.

Clients Signature:

