





JEFFERIES INDIA PRIVATE LIMITED

Account Opening Process

 Step 1	<ul style="list-style-type: none">• Account executive / relationship manager will co-ordinate and help you to set up your brokerage/ trading account. Alternatively, you can send an email to india_ops@jefferies.com requesting to set up the brokerage/trading account.• Client on boarding team will send out an email seeking basic details and standard account opening kit to you.
 Step 2	<ul style="list-style-type: none">• Based on the information provided by you, we will download the KYC documents available on KRA/CKYC portal• Post reviewing the downloaded documents, we will share the incremental list of KYC information/ documents that are required as per latest requirements
 Step 3	<ul style="list-style-type: none">• Submit the required information/ original application forms and supporting documents which include, but not limited to, KYC Application Form, CKYC Form, FATCA and CRS etc.
 Step 4	<ul style="list-style-type: none">• Our team will verify then submitted forms and supporting documents and if found in order we will register the account on the exchanges and segments as applicable.• Post confirmation from exchange on permission to trade, you will receive a welcome email consisting of your unique account number.