

## **Account Opening Procedure**

### **Background**

JM Financial Institutional Securities Limited (“JMFISL”) primarily caters to two types of clients:

- Institutional investors (domestic and foreign);
- Non-institutional investors.

### **Steps for account opening are as follows:**

The Company does not generally entertain walk-in clients. In case you wish to open a trading account with JMFISL, kindly contact Operations/ Customer care at [instops@jmfl.com](mailto:instops@jmfl.com) or call on [+91 22 6630 3141](tel:+912266303141).

- Send a request for opening a trading account along with the basic details of the entity whose account is sought to be opened;
- Based on the details furnished by you, the Operations/ Customer care will share the relevant Account Opening Form and checklist of documents required to open the account;
- Submit duly filled and executed copy of the Account Opening Form along with the required documents to Operations/ Customer care;
- After successful verification and completion of internal processes and necessary approvals, your trading account may be opened and you shall be intimated about the same.

