

Guidelines for New Account

1. Filling up Account Opening Form

There are two options for filling up the form:

- a. You may download the form using the link on our website or get a physical copy of the form from our office. Fill it up and submit to us along with the required documents.
- b. Fill up the details on our online application using the link "[Fill Online](https://msbpl.in/clients)" on msbpl.in/clients. Guidelines for filling up online are provided in annexure A.

2. Submitting the form:

Physical copy of the form filled using step 1 along with the relevant documents are to be submitted for final verification

3. Review:

Our compliance team will do a final review and inform if any changes are required

4. Confirmation:

Once all details are found in order, we will process the account opening and give a confirmation along with relevant details.

Flowchart for the above process is provided in Annexure B

Annexure-A: Guidelines for Filling Up the Form on Your App - <https://www.msbpl.in/webapp>:

Signing Up and Completing the Form:

1. **Visit the WebApp Page:** Open your web browser and go to <https://www.msbpl.in/webapp>.
2. **Sign Up:** Click on the "Sign Up" button to create your account. Provide your basic required details and create a secure password.
3. **Log In:** Once your account is verified, log in using your credentials on the main page.

Completing the Form:

1. **Choose Your Account Type:** Upon logging in, you'll have two options: "Individual" and "Non-Individual." Select the appropriate account type.
2. **Initiate the Form:** After choosing your user type, the relevant form will automatically appear on the screen.
3. **Fill in Required Details:** Complete all mandatory fields indicated with an asterisk (*). These might include personal information, contact details, and any specific details pertinent to your account type.
4. **Upload Supporting Documents:** In the last section for documents, you can upload supporting documents. Click the "Upload" button, select the files, and confirm the upload.
5. **Save Partial Data:** If needed, you can save partial data. This allows you to return to the form later and continue where you left off.
6. **Review:** Before submitting, review your entries for accuracy. Ensure all mandatory fields are filled, and any uploaded documents are attached.
7. **Confirm:** Once satisfied, you can inform us on our compliance team on registered email address (info@msbpl.in) or on phone at 033-35200634. You can also inform us directly over your already established communication channel, if any.
8. **Confirmation:** Upon successful verification, you'll receive a go-ahead message from our compliance team. You can log-in again and generate the pdf form where all the details provided will be pre-filled.
9. **Signature and Submission:** You can print the pdf and sign all the relevant fields on the form. Send us the form along with the relevant documents which were uploaded.

Additional Tips:

- **Secure Connection:** Ensure you're using a secure and trusted internet connection throughout the process.
- **Clear Documents:** If uploading documents, ensure they are clear, legible, and in the required format.

Annexure B: Flowchart - Account Opening Process

