Jefferies

Jefferies India Private Limited

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JEFFERIES INDIA PRIVATE LIMITED

Account Opening Process

Step 1	• 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	• 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	• 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	• 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.