



Benefits

- Fast account opening with minimum entry
- 10 client's entries can be done at one go.
- Simple process
- No assistance required.
- Saves lot of time.

Important *Points*

- Client's Details will be fetched from physical folio details available with NJ
- The module is for KYC complaint & Resident individual clients only with single holding pattern.
- The module is not available for NRI, Minor, Non Individual & Joint holders account.
- E wealth account will be activated as per name available in PAN.
- All other validation remains the same for E wealth account opening.
- FATCA , CKYC & Income Occupation fields will have to be uploaded manually.

Just 3 Steps

Step 1 - Select client and Generate the request (System will automatically generate the reference number in few minutes)

Step 2 – Go to > Stock Exchange > E form > Auto E wealth registration > EDIT Module & Update the pending details

Step 3 – Get the E wealth application authorized (OTP / Bio Metric)

Partner Desk

Investments ▾ **Stock Exchange ▾** Client Services ▾ Loans ▾ Admin ▾ Financial Tools ▾ Marketing ▾ E-Saathi Reward Points ▾

E-Wealth Reg. Status & DESTAT

E-Wealth Pending Investor Report **NEW**

E-Wealth Reg. Status Report

Destatementization

DRF Status Report

POA, Nominee & Mandate Status Report

Transactions

Stock Exchange Transaction Report - Mutual Fund

SIP Status Report **NEW**

Stock Exchange Transaction Report - Direct Equity

Trxn Confirmation Statement

Mandate Status Report **NEW**

Debt Market (OTC) Transactions **NEW**

STP Status Report **NEW**

SWP Status Report **NEW**

E FORM

E Wealth Account Registration

Auto E wealth Registration (NEW) **NEW**

KYC Registration Form **NEW**

Partner Trax

Transaction **NEW**

Print TIS **NEW**

Transaction Authorization Report **NEW**

Brokerage / Income Details

Client wise Brokerage Rates

Partner Brokerage Bills

Product Basket

Schemes Availability on TADA **NEW**

Pending Investor Report – Step 1

E-Wealth Pending Investor Report

PENDING INVESTOR REPORT **REQUEST REPORT**

Filter Export

Filter

Enter atleast 3 chars for filtration

Investor :

OR

Employee :

R
Realty
Tejal Dhadve

Group :

Ahmad Masood
Ajay Agarwal-01376
Ajay Gandabhai Patel
Ajay Gandhi

Note: Report does not consider Accounts where Primary Applicant is a Minor

Apply Reset

To start Click on report

Select Group

After Selection Click on Apply

The Report can be Viewed Group wise, so that it is easier for you to process the EWA as per the holding pattern.

Pending Investor Report – Step 1

Select the Check Box
For client you wish to open EWA

PENDING INVESTOR REPORT									
Sr No	C E-V Acc	Partner / Partner Employee	Group	1st Holder					
				Name	PAN	Mobile	Email	DOB	Folio No
1	<input type="checkbox"/>	<input type="text"/>	Ajay Agarwal- <input type="text"/>	AKSHAY AJAYKUMAR AGARWAL	ADHPA8087F	<input type="text" value="9714999552"/>	<input type="text" value="akshay@shivanigroup.co"/>	<input type="text" value="14-07-1981"/>	419145865401
2	<input type="checkbox"/>	<input type="text"/>	Ajay Gandabhai Patel	Ajay Gandabhai Patel	ALBPP8681L	<input type="text" value="9377781129"/>	<input type="text" value="patelajayg@yahoo.co.in"/>	<input type="text" value="02-03-1979"/>	1014598825

Records from 1 to 2 Page 1

Apply Reset

Click Apply for
further process

It is advisable to verify client details such as mobile , Email and
DOB before further processing.

Pending Investor Report – Step 1

PENDING INVESTOR REPORT

Sr No	Open E-Wealth Account	Partner / Partner E	DOB	Folio No
1	<input checked="" type="checkbox"/>		988	10139149/07
2	<input checked="" type="checkbox"/>		980	3472600/97
3	<input type="checkbox"/>			461188238966

Reference Number generation request posted successfully. Please note Request ID: 73 for future reference.

OK

RAMNIKBHAI KH... AAGHK1456C 9999999999 aa@njgroup.in

HUF

Request ID will be generated once the request is submitted for Form Filling.

Request Report – Step 1

Click

E-Wealth Pending Investor Report

PENDING INVESTOR REPORT **REQUEST REPORT**

Request ID:

OR

Request Generation From Date : 

Request Generation To Date : 

To View the status of Request submitted

Request Report – Step 1

E-Wealth Pending Investor Report

PENDING INVESTOR REPORT

REQUEST REPORT

Click to Check the Reference Number

REQUEST REPORT

Sr No	REQUEST ID	REQUEST GENERATION DATE	PENDING	PROCESSED	REJECTED	TOTAL
1	73	05-04-2020	2	0	0	2

Records from 1 to 1

Page 1

Close

Status of Request can be Viewed from request report.

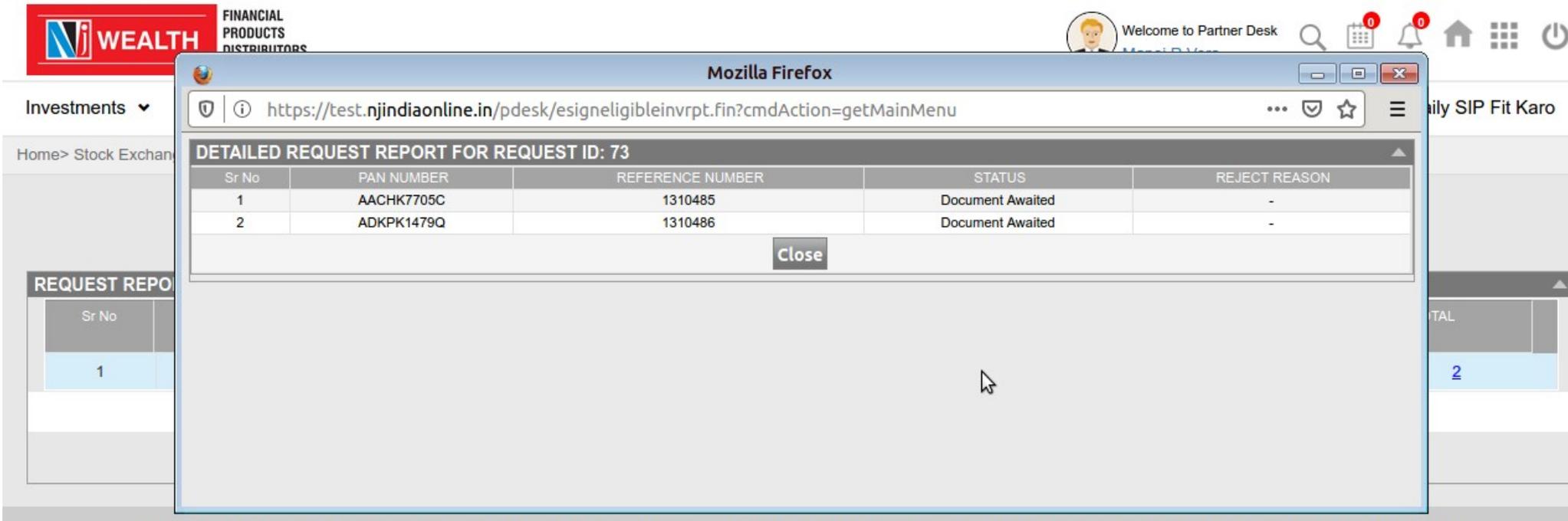
Pending = Request is not yet processed.

Processed = Reference number are generated and they are in Document awaited status.

Rejected = Request is rejected due to any reason

Reason of rejection will be displayed in hyperlink in total Column.

Request Report



The screenshot shows a web application interface with a browser window open. The browser window title is "Mozilla Firefox" and the address bar shows the URL: <https://test.njindiaonline.in/pdesk/esigneligibleinvrpt.fin?cmdAction=getMainMenu>. The main content of the browser window is a "DETAILED REQUEST REPORT FOR REQUEST ID: 73".

Sr No	PAN NUMBER	REFERENCE NUMBER	STATUS	REJECT REASON
1	AACHK7705C	1310485	Document Awaited	-
2	ADKPK1479Q	1310486	Document Awaited	-

Below the table is a "Close" button. The background of the web application shows a logo for "WEALTH FINANCIAL PRODUCTS DISTRIBUTORS" and a user profile with the text "Welcome to Partner Desk".

You can view the reference number generated.

Auto E wealth Registration (New) – Step 2



NEW ENTRY

EDIT

Ref No

OR

Application Status

Account Type*

E Wealth Account

Form Type*

Normal PMS Both

Application Entry From Date*

Application Entry To Date*

SUBMIT

RESET

Edit module to be used for entering FATCA , Income occupation, CKYC Details & upload the documents required.

Auto E wealth Registration (New) – Step 2



NEW ENTRY

EDIT

Ref No

OR

Application Status

Account Type*

E Wealth Account

Form Type*

Normal PMS Both

Application Entry From Date*

Application Entry To Date*

SUBMIT

RESET

Edit module to be used for entering FATCA , Income occupation, CKYC Details & upload the documents required.

Auto E wealth Registration (New) – Step 2



NEW ENTRY **EDIT**

Ref No

OR

Application Status:

Account Type*: E Wealth Account

Form Type*: Normal PMS Both

Application Entry From Date*:

Application Entry To Date*:

SUBMIT **RESET**

Click The link for EDIT

Sr No	Print	Resend link	Account Type	Form Type	Ref No.	PMS Trax Ref No.	Mode	Applicant Name as per PAN (income Tax website)	Applicant Name (As provided)	Applicant PAN	Applicant Address	Mobile	Phone(R)
1	NA	<input type="checkbox"/>	E Wealth Account	Normal	2430741	NA	ESIGN	Applicant Name will be as per PAN (Income Tax website)		AIXPR3827K	Surat Gujarat India	9727761426	NA
2	NA	<input type="checkbox"/>	E Wealth Account	Normal	2430538	NA	ESIGN	<input type="text"/>		BQRPR6934G	Surat Gujarat India	8000236930	NA

Edit module to be used for entering FATCA , Income occupation, CKYC Details & upload the documents required.

Auto E wealth Registration (New) – Step 2



MAIN DETAILS ▾

KYC Details

KYC DETAILS ▾

REF NO : 2430741

Applicant ▾

› Other Details

OTHER ADDITIONAL DETAILS ▾

DOCUMENT DETAILS

FATCA DETAILS ▾

Applicant - Other KYC Details

Marital Status *

Married Unmarried Other

Father's Name Spouse's Name

Father Initial *

MR ▾

Father First Name *

Father Middle Name

Father Last Name *

Residential Status *

Resident Individual ▾

SAVE & NEXT

Updated the CKYC Details

Auto E wealth Registration (New) – Step 2

⏻

MAIN DETAILS ▾

KYC DETAILS ▾

OTHER ADDITIONAL DETAILS ▾

Other Additional Details

REF NO : 2430741

Income & Occupational Details

Applicant - Income & Occupational Details

Income Range *	Net Worth [In Rupees] *	As on Date *ⁱ
<input type="text" value="Rs. 1,00,001 To Rs. 5,00,000"/>	<input type="text" value="Rs. 5,00,001 To Rs. 10,00,000"/>	<input type="text" value="20-03-2020"/>
Occupation *	Politically Exposed Person *	Correspondence Country *
<input type="text" value="Private Sector Service"/>	<input type="text" value="Not Applicable"/>	<input type="text" value="India"/>
Correspondence State *	Correspondence City *	
<input type="text" value="Gujarat"/>	<input type="text" value="Surat"/>	

SAVE & NEXT

Bank Details

Contact Details

Preferences

Income & Occupational Details

Nominee Details

Brokerage Structure

DOCUMENT DETAILS

FATCA DETAILS ▾

It is advisable to update correct Income occupation details.

Auto E wealth Registration (New) – Step 2

WEALTH ON YOUR FINGERTIPS



MAIN DETAILS ▾

KYC DETAILS ▾

OTHER ADDITIONAL DETAILS ▾

DOCUMENT DETAILS

FATCA DETAILS ▾

FATCA Details

REF NO : 2430741

Applicant

Nationality*	Country of Birth*	State*
INDIA ▾	INDIA ▾	Gujarat ▾
Place of Birth*	Address Type*	Phone number with ISD Code*
<input type="text"/>	Select Address Type ▾	ISD Code 9727761426

Is your Country of Tax Residency other than India ?

Yes No

FATCA & CRS Terms & Conditions

I have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I also confirm that I have read and understood the FATCA & CRS Terms and Conditions above and hereby accept the same.

SAVE

Update FATCA Details.

Auto E wealth Registration (New) – Step 2

⏻

MAIN DETAILS ▾

KYC DETAILS ▾

OTHER ADDITIONAL DETAILS ▾

DOCUMENT DETAILS

FATCA DETAILS ▾

Documents Details

REF NO : 2430741

Applicant Documents

Document Type	Document Name	Proof No.	Validity/Expiry of Proof submitted	Image	Attach Document
Bank Proof *	Select Bank Proof ▾	NA	NA	NA	 <input type="button" value="Browse..."/> No file selected.
Specimen Signature * Sample File	Specimen Signature ▾	NA	NA	NA	 <input type="button" value="Browse..."/> No file selected.
Additional Document (Bank Proof)	ADDITIONAL DOCUMENT 1 ▾	NA	NA	NA	 <input type="button" value="Browse..."/> No file selected.
Additional Document - 1 (if required)	Select Additional Document ▾	NA	NA	NA	 <input type="button" value="Browse..."/> No file selected.
Additional Document - 2 (if required)	ADDITIONAL DOCUMENT-2 ▾	NA	NA	NA	 <input type="button" value="Browse..."/> No file selected.

Note : If name is not printed on copy/canceled cheque then please provide bank letter/ bank passbook/ bank statement for verification & upload the same in additional document option. Please upload clear & visible image with A4 size paper scan.

Upload the Required Documents

Auto E wealth Registration (New) – Step 3

WEALTH ON YOUR FINGERTIPS

MAIN DETAILS -

OTHER ADDITIONAL DETAILS -

DOCUMENT DETAILS

FATCA DETAILS -

EKYC & ESIGN DETAILS

PRINT DOCUMENTS

EKYC & ESIGN Details

REF NO : 1794131

Applicant EKYC

Applicant Name Applicant Preferred T&C Language *

Applicant Name will be as per PAN (Income Tax website) English

I, the holder of Aadhaar number [View](#), hereby give my consent to NJ INDIA INVEST PRIVATE LIMITED to obtain my Aadhaar number, name and fingerprint/Iris for authentication with UIDAI and perform E-KYC for Opening Trading & Demat Account. NJ INDIA INVEST PRIVATE LIMITED has informed me that my identity information would only be used for performing E-KYC as per the consent given and also informed that my biometrics will not be stored / shared and will be submitted to CIDR only for the purpose of authentication.

I authorise NJ INDIA INVEST PRIVATE LIMITED to consider my final KYC details as per CKYC.

Applicant EKYC Mode * BioMetric Vendor *

OTP Biometric Mantra Morpho

Bio Metric Device Help [Click Here](#)

SUBMIT

Now E wealth application is ready for Client authorization.

*After client
Authorization NJ
will soon activate
the EWA*





