



## **PMS ACCOUNT OPENING REQUIREMENTS – FOR PARTNERSHIP**

All documents pertaining to the Firm should be self attested by the authorized Partner with the Firm's rubber stamp – each 4 sets required

### **I. Documents of the Partnership Firm**

1. Copy of PAN card
2. Copy of Bank statement or Telephone Bill (Latest)
3. Partnership Deed - Deed to have the relevant clauses on investments.
4. Partnership registration certificate if the firm is registered.
5. Audited Balance Sheet and Profit and Loss account for the last 2 years
6. Consent Letter on the Letter Head of the Partnership signed by all the Partners (Format attached)
7. List of Partners (Format attached) on the letter head of the company
8. 4 photographs of the Partners duly signed
9. A cheque for Rs. 10,000/- favoring HDFC Bank A/c. No. \_\_\_\_\_ (Name of the client) from the existing partnership account
10. KYC application (attached)
11. Annexure O (Attached)

### **II. Documents of all Partners – each 4 sets**

Documents should be self attested by the respective partners

12. Copy of PAN card
13. Address Proof – Ration Card / Passport/ Voters ID, Bank Statement / BSNL Telephone Bill (Latest)
14. KYC application (attached)

### **Note:**

- a) In the HDFC Bank application - Partnership declaration on the 2nd page to be signed by all the partners without seal.
- b) Original NOC from their existing banker incase the firm enjoys credit facilities from other banks
- c) On Page no 50 the PMS application client should add in his/her own hand writing the following and affix his/her signature

"I have understood the fees computation / charges structure".

