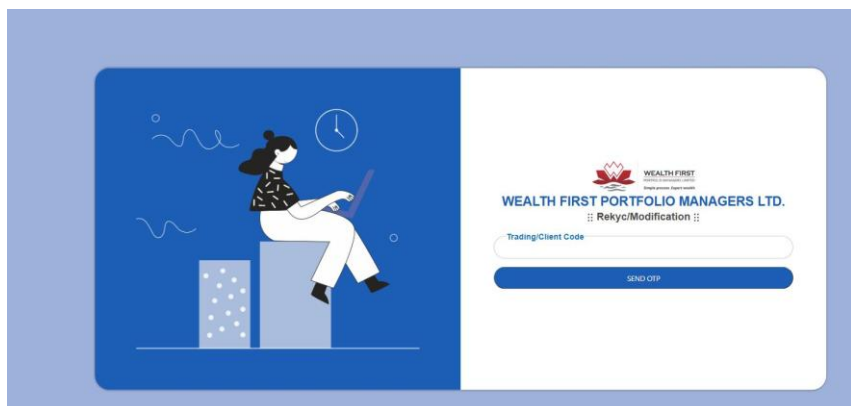




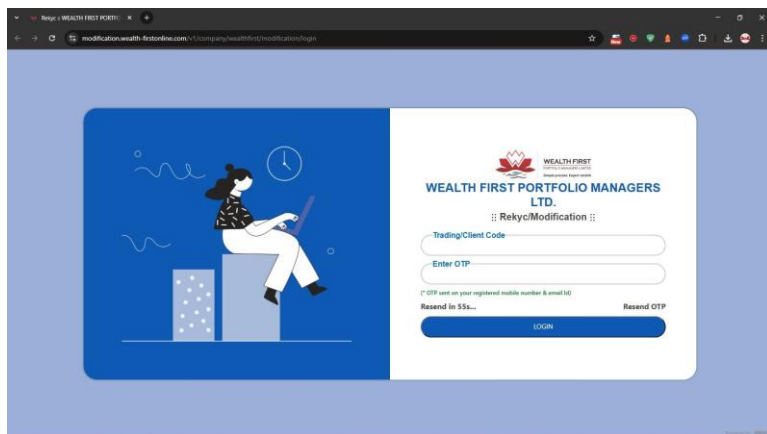
REKYC MODIFICATION GUIDE

Go to <https://modification.wealth-firstonline.com/v1/company/wealthfirst/modification/login>

1. Enter Your Client code



2. Enter Otp received on Register Mobile Number



3. Verify Details

Account Details

Name	Client ID	Account Status	PAN	CKYC No.
[REDACTED]	[REDACTED]	ACTIVE	[REDACTED]	[REDACTED]

Personal Details

Updating e-mail and phone number will take up to 48 hours to reflect in your account post verification.

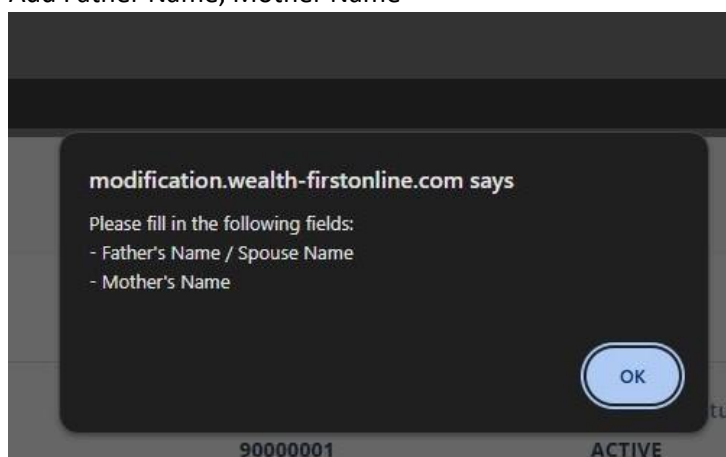
Father's Name / Spouse Name	Mother's Name	Date of Birth
[REDACTED]	[REDACTED]	[REDACTED]
Gender male	Marital Status married	E-mail [REDACTED]@gmail.com
Mobile +91 [REDACTED]	Address [REDACTED]	

NEXT →



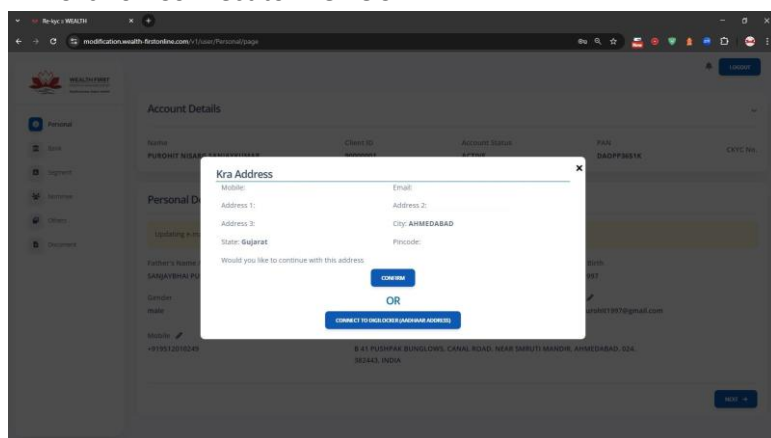
REKYC MODIFICATION GUIDE

4. Add Father Name, Mother Name

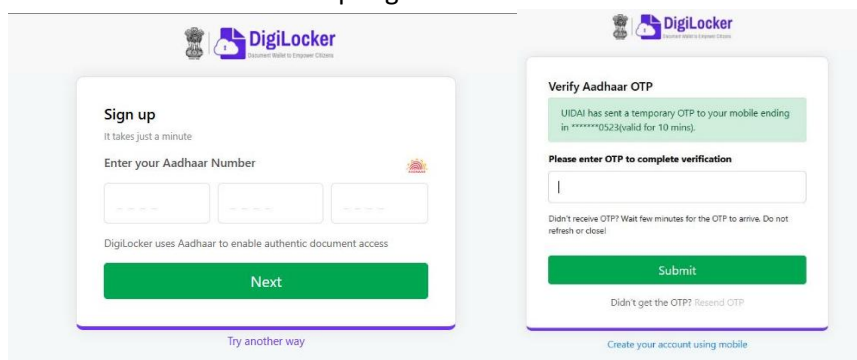


5. For change in address it will done only via Digilocker method only

- Click on Connect to DIGILOCKER



6. Add Aadhar number and Otp registered on Aadhar



7. Enter Digilocker PIN

- If you are new then you can create new pin
- To regenerate pin click on forgot my PIN and in next screen enter DOB and you can reset Your DIGILOCKER PIN
- Click on allow





REKYC MODIFICATION GUIDE

8. To add your bank click on “add bank account”

The screenshot shows the 'Add Bank Account' step in the REKYC modification process. The interface includes a sidebar with navigation options: Personal, Bank, Segment, Nominee, Others, and Document. The main content area is titled 'Account Details' and shows the account status as 'ACTIVE'. Below this, the 'Bank Account Details' section contains a yellow banner with the text: 'Addition of Bank Account: Please link those bank accounts only, in which you are primary/secondary account holder Maximum 3 accounts can be linked to your trading account.' There are input fields for 'Default Bank', 'Account Number', and 'IFSC'. A dashed box with a plus sign and the text 'Add Bank Account' is positioned next to the 'Account Number' field. At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

- Add new bank details

The screenshot shows the 'Add Bank Account' modal form. It includes the following fields and options:

- Account Number (Required)
- Re-enter Account Number (Required)
- IFSC (Required)
- Account Type: Saving
- A declaration checkbox: ☐ I/We hereby declare that the above information provided by me, is true and to the best of my knowledge. I/We undertake to inform WEALTH FIRST PORTFOLIO MANAGERS LTD. of any discrepancies, changes, or incorrect information that I become aware of, immediately. I/We would be held liable for all such consequences/actions taken with respect to the above information. This change will affect the Trading and Demat account that I hold with WEALTH FIRST PORTFOLIO MANAGERS LTD.

A 'CONTINUE' button is located at the bottom of the form.

9. To change segment

The screenshot shows the 'Segment Details' form. It includes the following sections:

- Segment Details: NSE (CASH, MF) and BSE (CASH, MF).
- My sole country of tax residency India: ☒ I have understood the information requirements of this form (read along with 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 & terms and conditions below and hereby accept the same. Name for your account will be updated as per the Income Tax database due to Exchange regulations.

At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.



REKYC MODIFICATION GUIDE

10. To add nominee click on Yes and fill the details of the nominee, if you opt out to add nominee then click on NO and click on NO change if you don't want to modify

Nominee Details

Do you want to add nominee

☐ YES ☐ NO ☐ NO CHANGE

[< PREVIOUS](#) [NEXT >](#)

11. Nominee Updated

Nominee Details

Do you want to add nominee

☐ YES

[< PREVIOUS](#) [NEXT >](#)

Confirmation

Nominee Data Updated

[OK](#)

12. Other Details like- Annual income, Occupation can be change.

Other Details

Annual Income as on date

Occupation

DP ID *

[< PREVIOUS](#) [NEXT >](#)

13. Upload Relevant supporting Documents and verify with Dlgilocker

Upload Document

Aadhar Pdf (View Only)

Aadhar Image (View Only)

Client Image * [TAKE IPV](#)

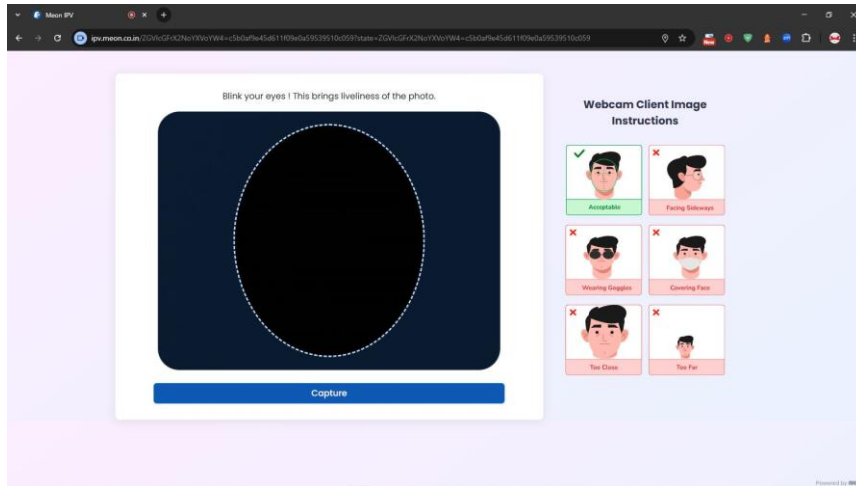
[📄](#)

[< PREVIOUS](#) [NEXT >](#)

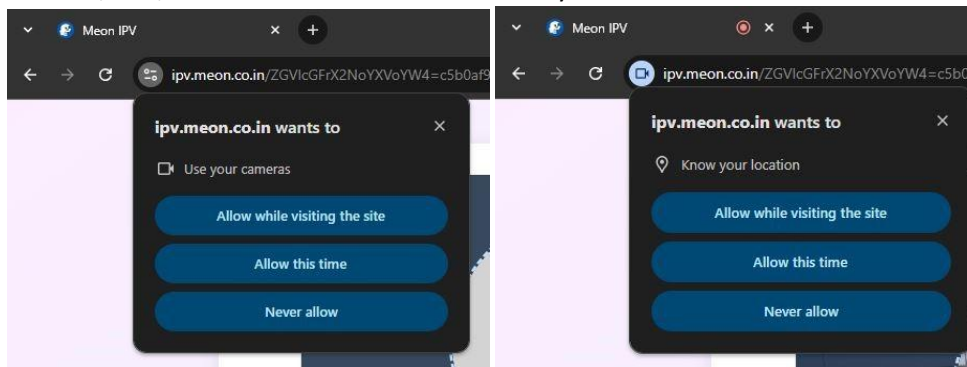
14. Take IPV



REKYC MODIFICATION GUIDE



15. Camera, Mic, location Permission is Mandatory



16. After Completion click on next to process the Esign



Click on REKYC, KRA, and REKYC PDF eSign, enter your Aadhaar number, verify using OTP sent to your Aadhaar-linked mobile, and complete the eSign process.