WEALTH FIRST
PORTFOLIO MANAGERS LIMITED
Simple process. Expert wealth

Account Modification

reKYC · Client Step-by-Step Guide

Wealth First Portfolio Managers Ltd.

Document	Account Modification / reKYC — Step-by-Step Guide
Prepared by	Wealth First IT Team
Applicable to	Clients updating KYC / account details online
Modification portal	modification.wealth-firstonline.com (link shared by Wealth First)
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About this guide

This guide explains how to update your KYC and account details online with Wealth First Portfolio Managers Ltd. through the modification (reKYC) portal. The process is fully digital and usually takes about 10–15 minutes to complete.

Follow the steps in order. All screenshots below are from the live portal, with personal details masked for privacy.

Before you begin — keep these ready

- Your Trading / Client Code (shared by Wealth First).
- Your registered mobile number and email — OTPs are sent here.
- Your Aadhaar number, with the mobile linked to Aadhaar (needed for DigiLocker KYC and Aadhaar eSign).
- For a bank change: the bank account number and IFSC of the account to be added.
- For a nominee change: the nominee's name, relationship, date of birth and share percentage.
- A soft copy of your PAN and signature (JPG/PNG/PDF, each under 5 MB) and a device with a working camera.

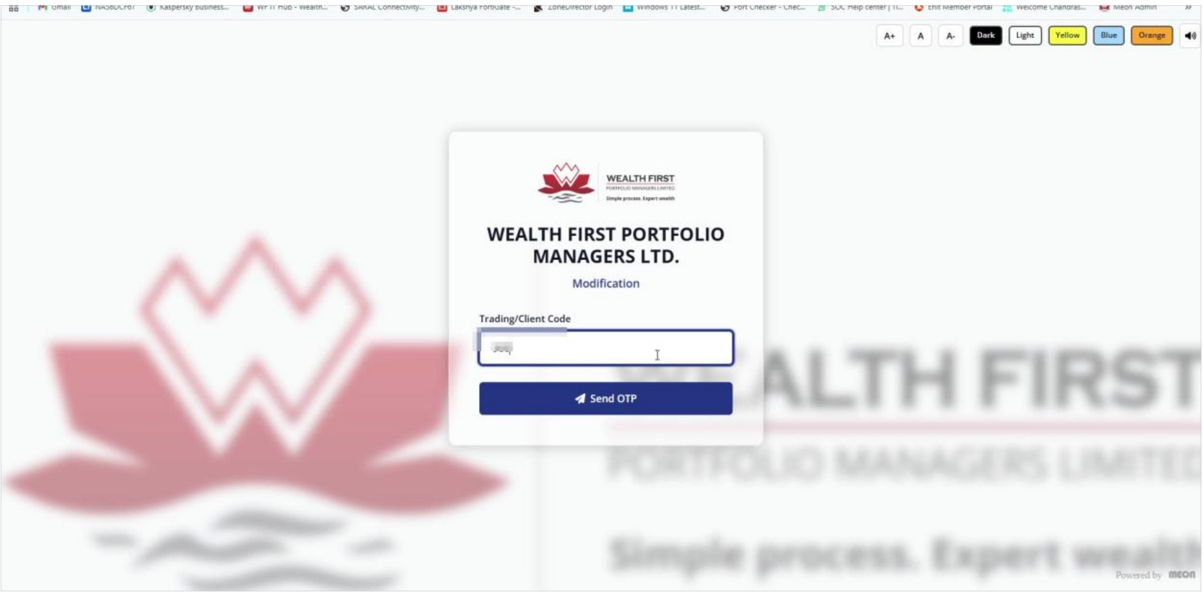
Modifications covered in this guide

- **Personal details** — father's/mother's name, marital status, email, mobile and address
- **Bank account details** — add a new bank account and set the default account
- **Segment** — activate exchange segments (NSE / BSE — Cash, Mutual Fund)
- **Nominee details** — opt in or opt out, and add or update nominees
- **Other details** — annual income, net worth and occupation

Please note: Do not refresh or close the browser during the process. Each OTP is valid for a few minutes only — enter it promptly. Updates to email or mobile number take up to 48 hours to reflect after verification.

Step 1 · Open the modification portal & enter your Client Code

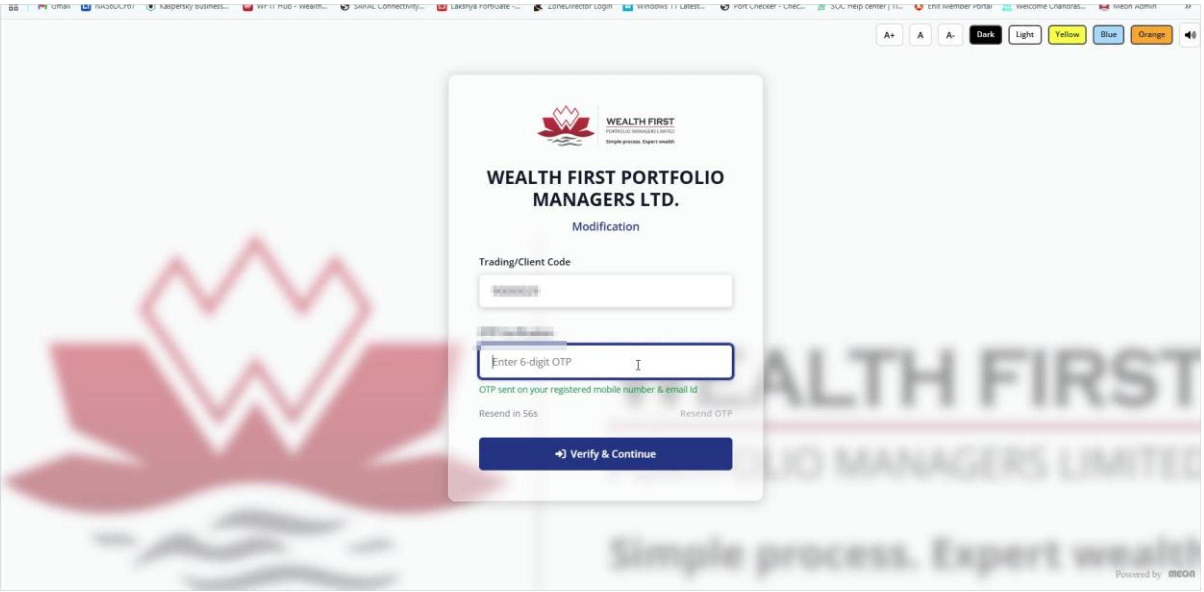
- Open the modification (reKYC) link shared by Wealth First.
- Enter your Trading / Client Code in the box.
- Click Send OTP.



Modification portal login — enter your Client Code and click Send OTP.

Step 2 · Verify the OTP

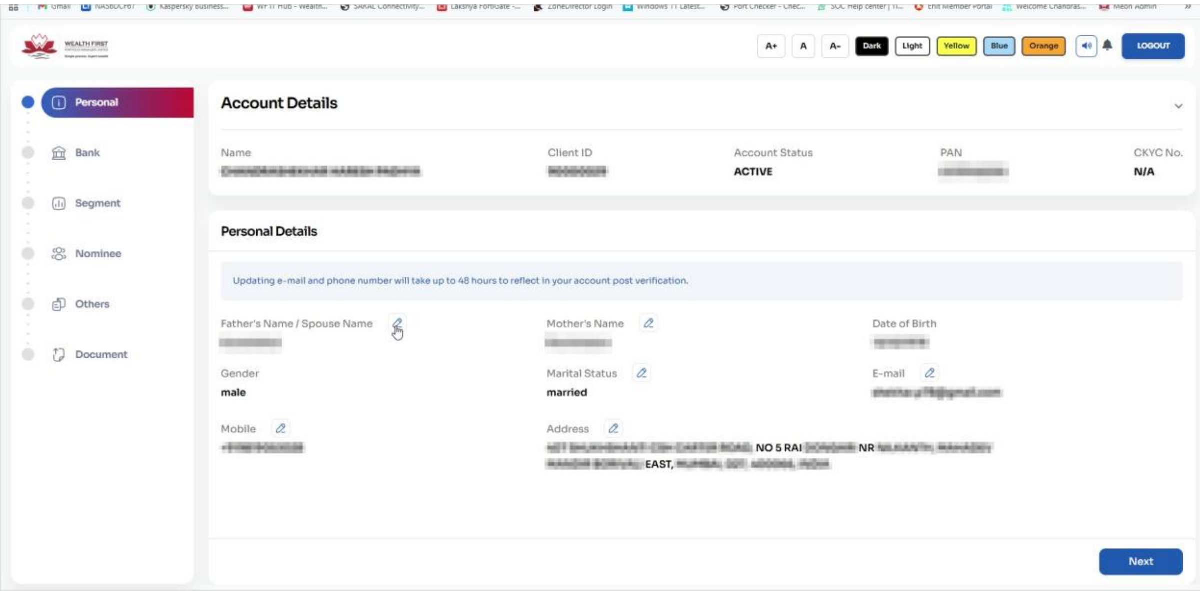
- An OTP is sent to your registered mobile number and email.
- Enter the 6-digit OTP in the OTP Verification box.
- Click Verify & Continue. Use Resend OTP if it does not arrive.



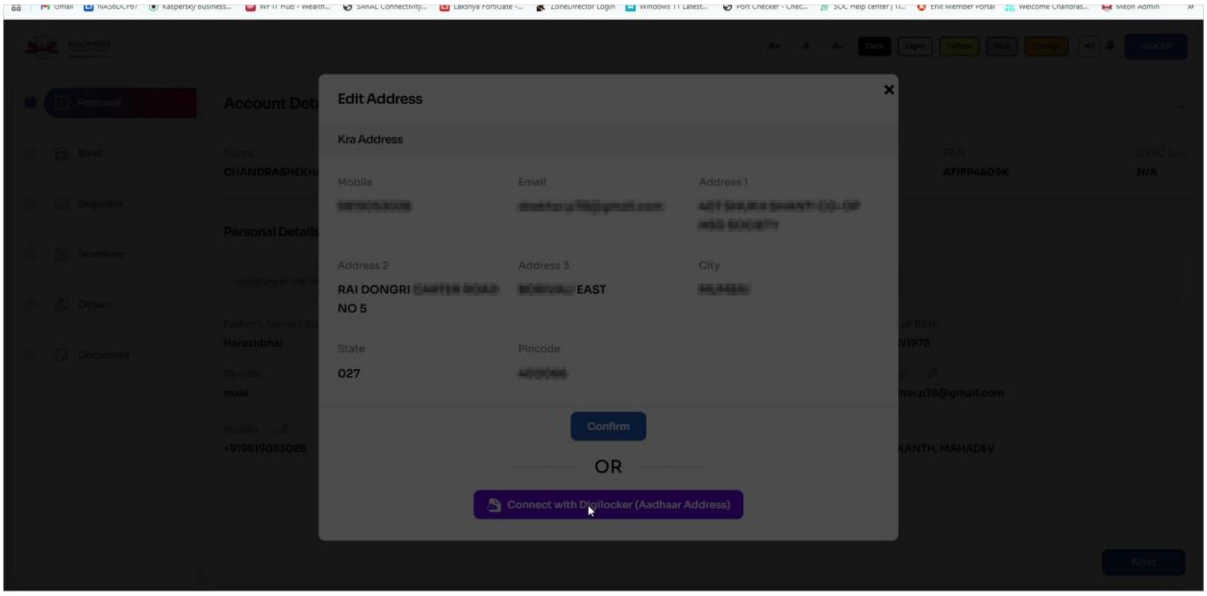
Enter the 6-digit OTP sent to your registered mobile and email.

Step 3 · Modify your Personal Details

- On the Personal tab, click the pencil icon beside any field to edit it — Father's / Mother's Name, Marital Status, E-mail, Mobile or Address.
- For the Address, an Edit Address window opens. You can confirm the existing KRA address, or fetch a fresh address using Connect with DigiLocker (Aadhaar Address).
- After updating your details, click Next / continue to the Aadhaar KYC step.



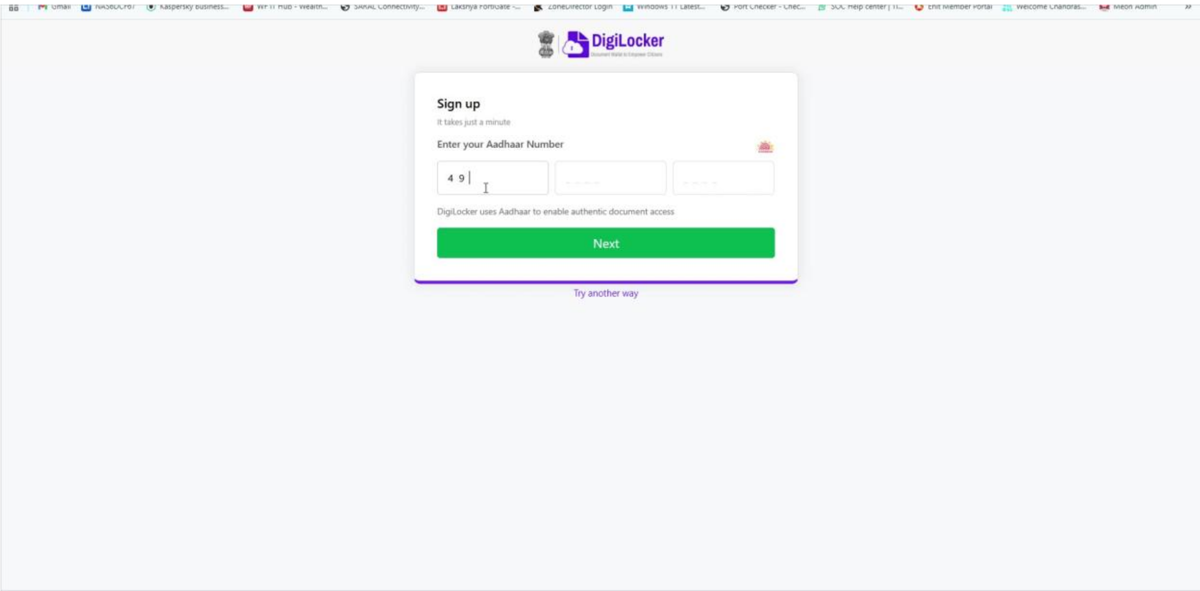
Personal Details — click the pencil icon beside a field to edit it.



Edit Address — confirm the KRA address, or fetch it via DigiLocker.

Step 4 · Complete Aadhaar KYC via DigiLocker

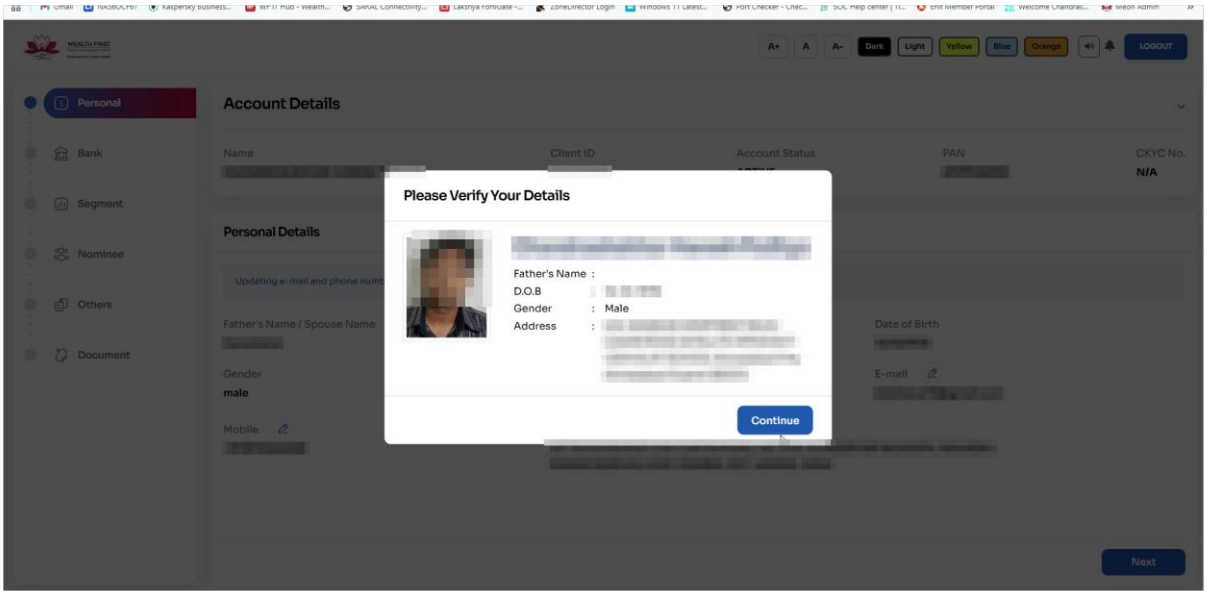
- You will be taken to DigiLocker to fetch your KYC documents securely.
- Enter your 12-digit Aadhaar number and click Next.
- Enter the OTP sent to your Aadhaar-linked mobile, then your 6-digit DigiLocker security PIN if prompted.



DigiLocker — enter your Aadhaar number to begin the document fetch.

Step 5 · Verify your fetched details

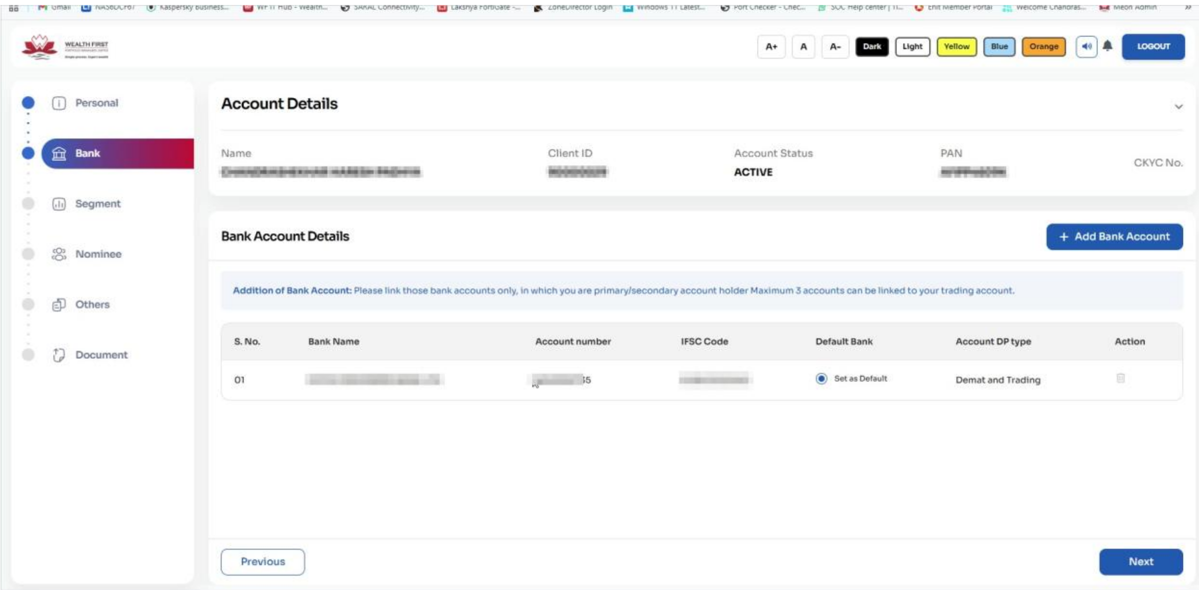
- Your photo and demographic details are fetched from DigiLocker.
- Check that the details are correct and click Continue.



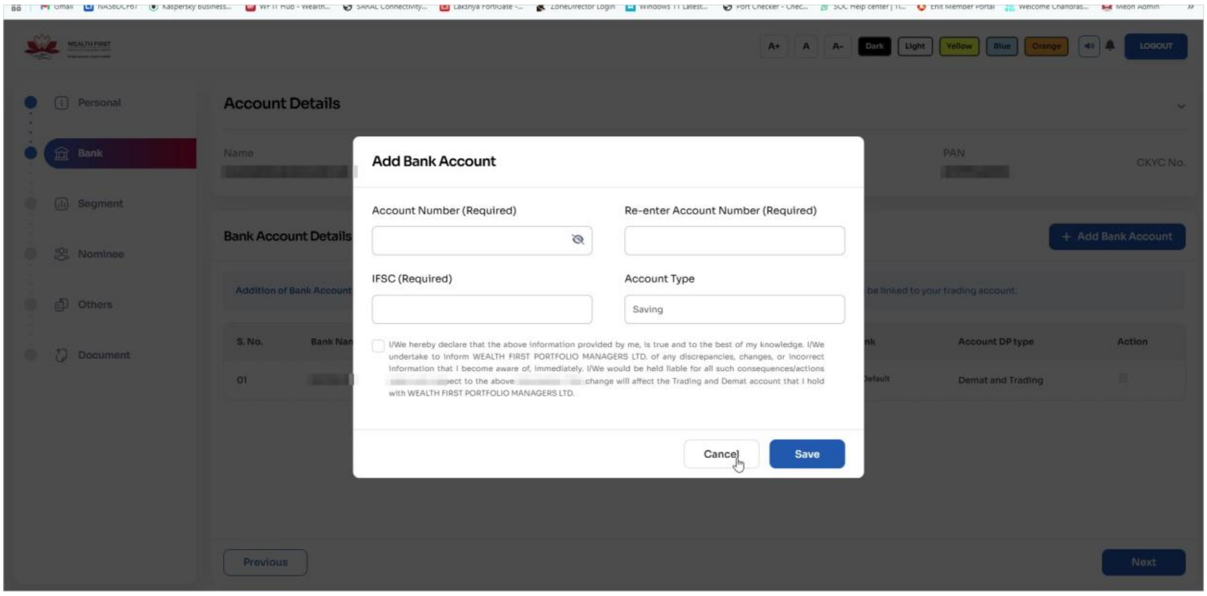
Confirm the details fetched from DigiLocker, then click Continue.

Step 6 · Add or modify a Bank Account

- On the Bank tab, click Add Bank Account to link a new account.
- Enter the Account Number, re-enter it, add the IFSC Code and select the Account Type, then Save.
- Use Set as Default to mark your primary account. A maximum of 3 accounts can be linked.



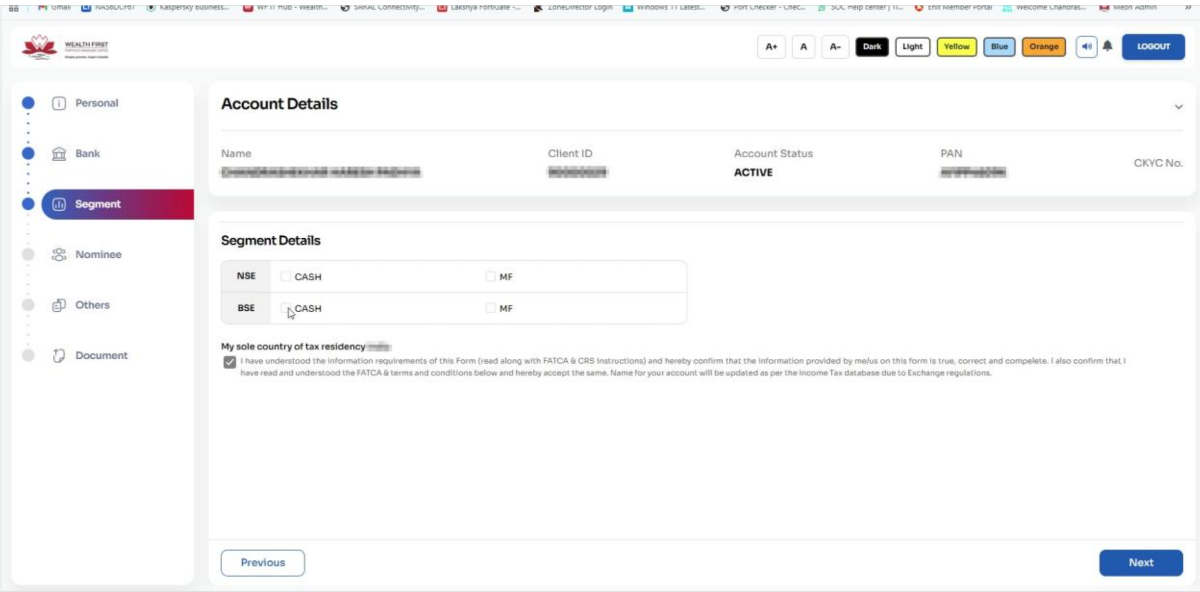
Bank Account Details — existing accounts and the Add Bank Account option.



Add Bank Account — enter the account number, IFSC and account type.

Step 7 · Activate or modify your Segment

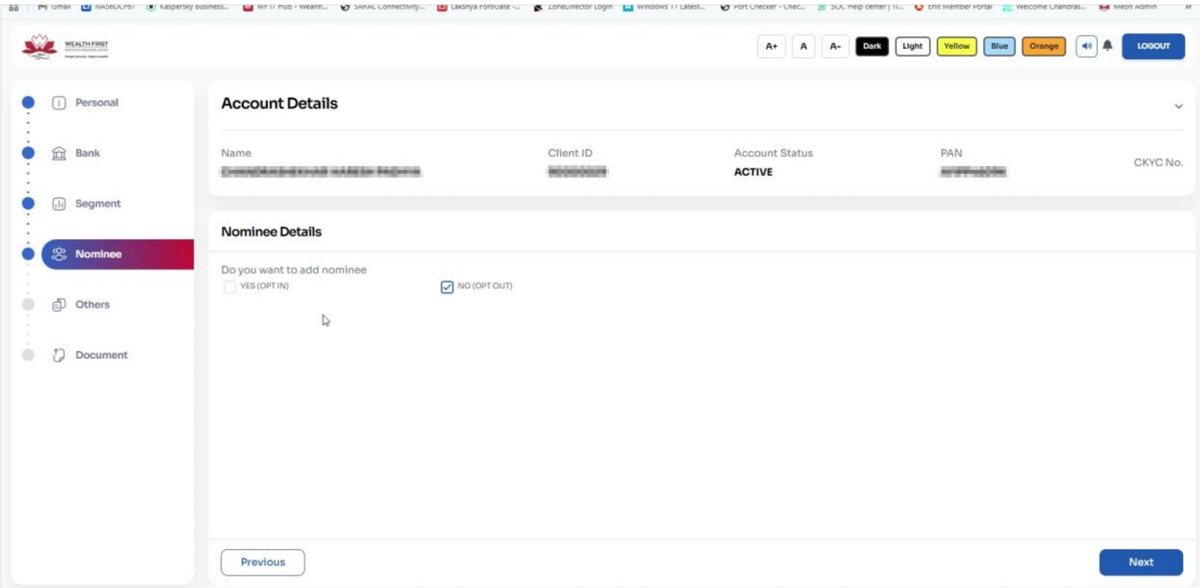
- On the Segment tab, select the exchange segments you want active — NSE and BSE (Cash, Mutual Fund).
- Confirm the tax-residency declaration (sole country of tax-residency: India).
- Click Next to continue.



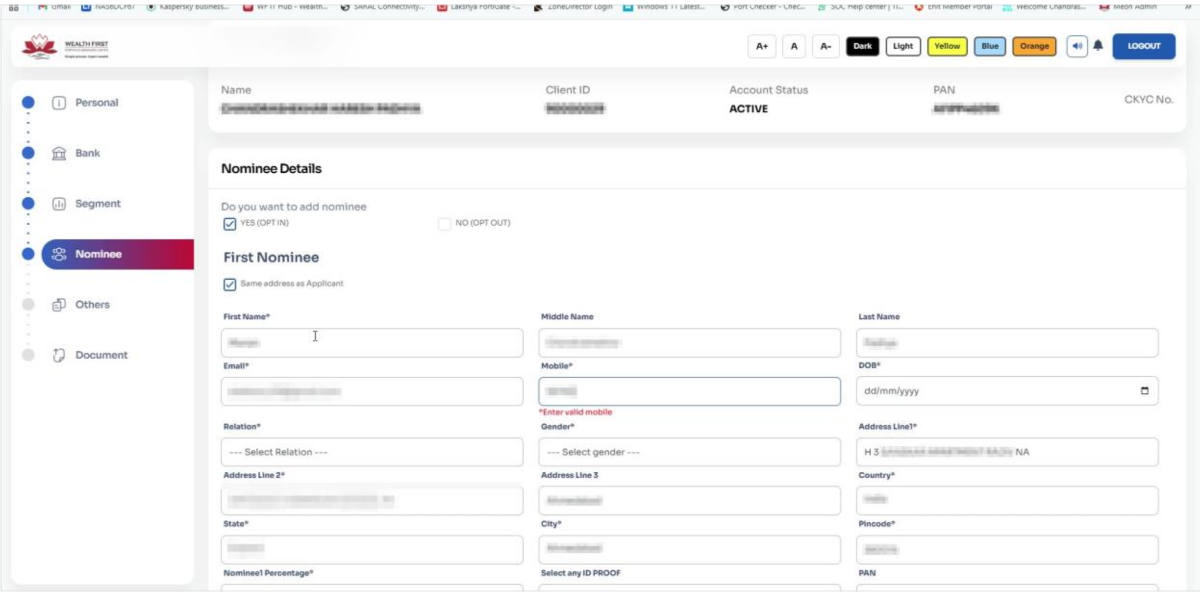
Segment — activate the required segments and confirm the tax-residency declaration.

Step 8 · Add or update your Nominee

- On the Nominee tab, choose YES (Opt-in) to add a nominee, or NO (Opt-out) to decline.
- For each nominee, enter the name, relationship, date of birth, contact details, address and share percentage.
- Tick Same address as Applicant to reuse your address. Total share across nominees must add up to 100%.



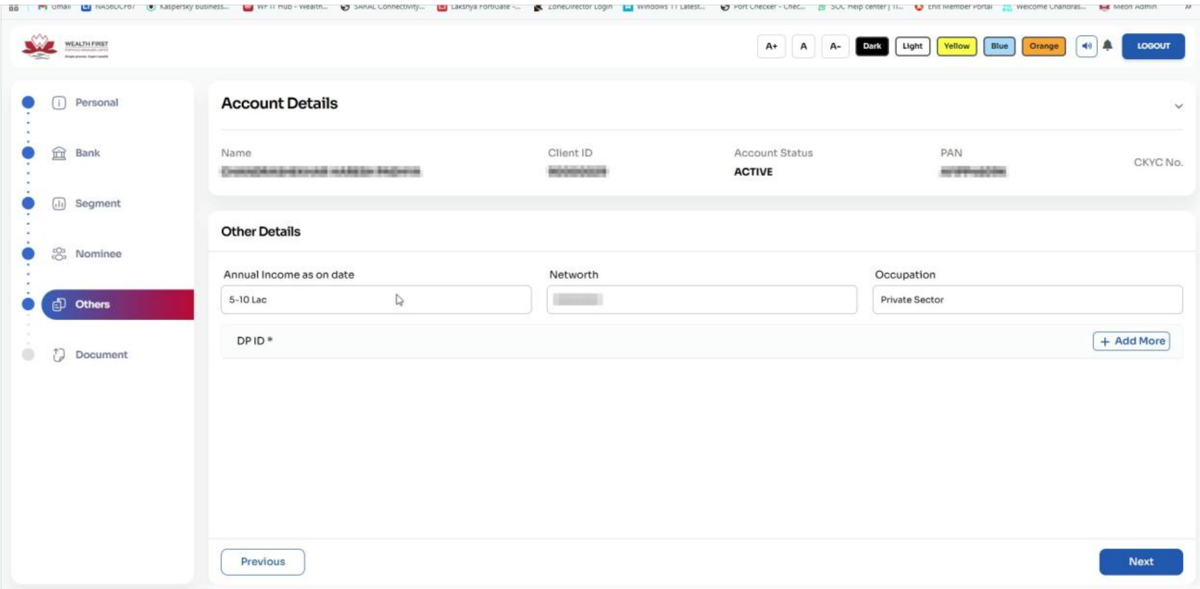
Nominee Details — choose Opt-in or Opt-out.



First Nominee — enter the nominee's details and share percentage.

Step 9 · Update your Other Details

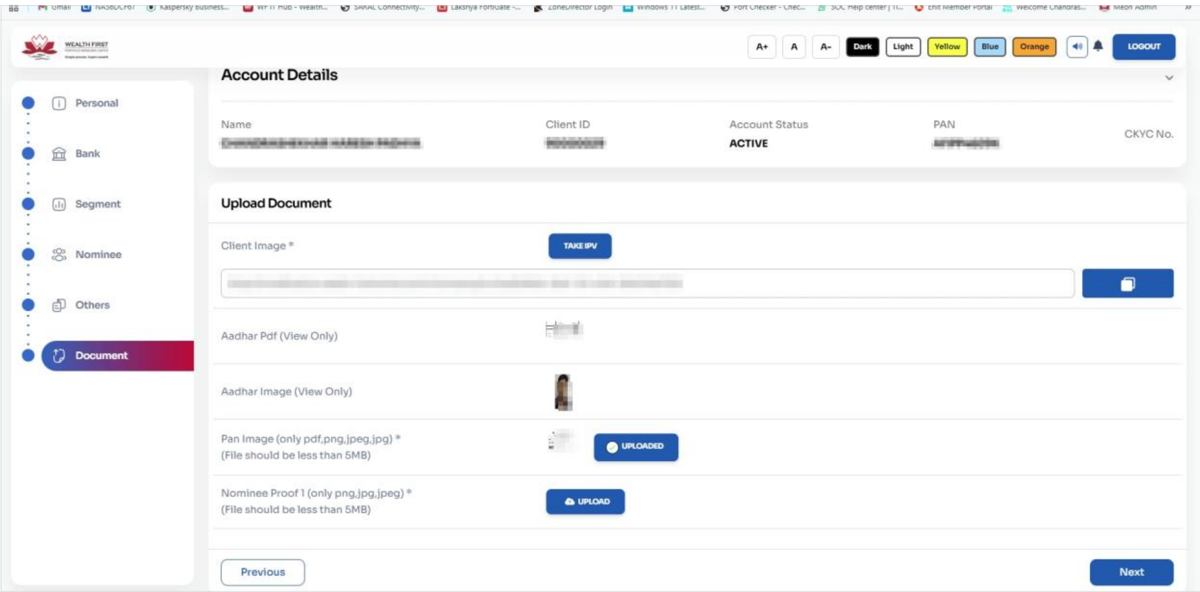
- On the Others tab, update your Annual Income, Net Worth and Occupation.
- Enter your DP ID if required, then click Next.



Other Details — update annual income, net worth and occupation.

Step 10 · Upload the required documents

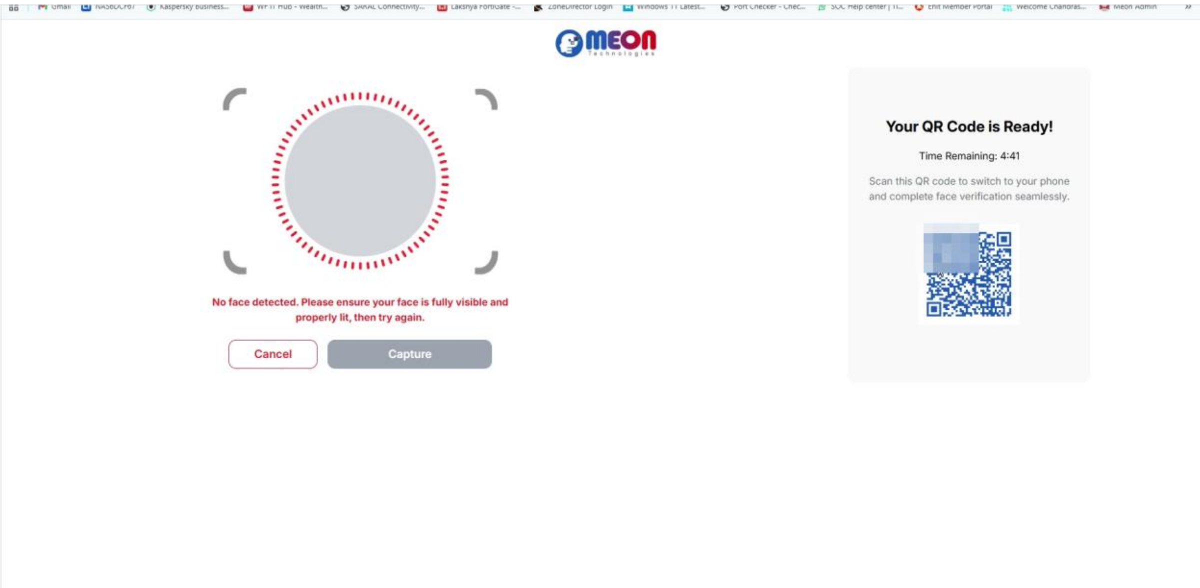
- Your Aadhaar (PDF and image) is auto-fetched and shown as view-only.
- Upload your PAN image and signature (PNG/JPG/JPEG/PDF, under 5 MB) if prompted.
- Your live photo is captured in the next step (In-Person Verification). Click Next to proceed.



Upload Document — Aadhaar/PAN are auto-fetched; upload PAN image and signature if required.

Step 11 · Complete In-Person Verification (IPV)

- Scan the on-screen QR code with your phone to switch to the mobile camera, or use the on-screen camera.
- Ensure your face is fully visible and well-lit, then tap Capture.
- Complete the capture within the time shown on screen.

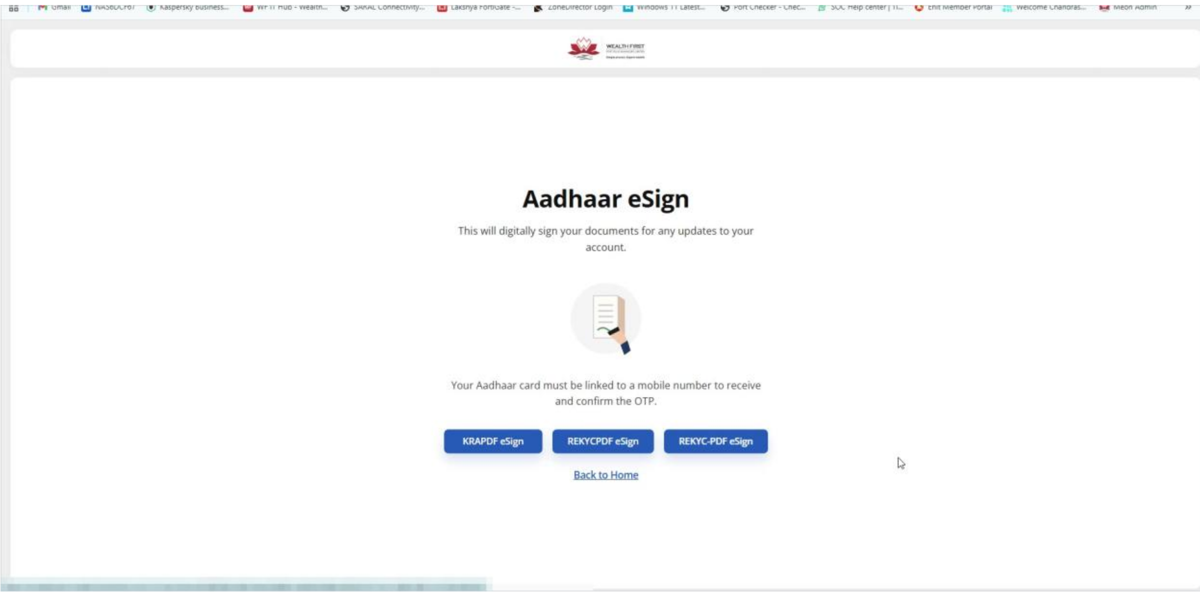


In-Person Verification — scan the QR code and capture a clear, well-lit photo of your face.

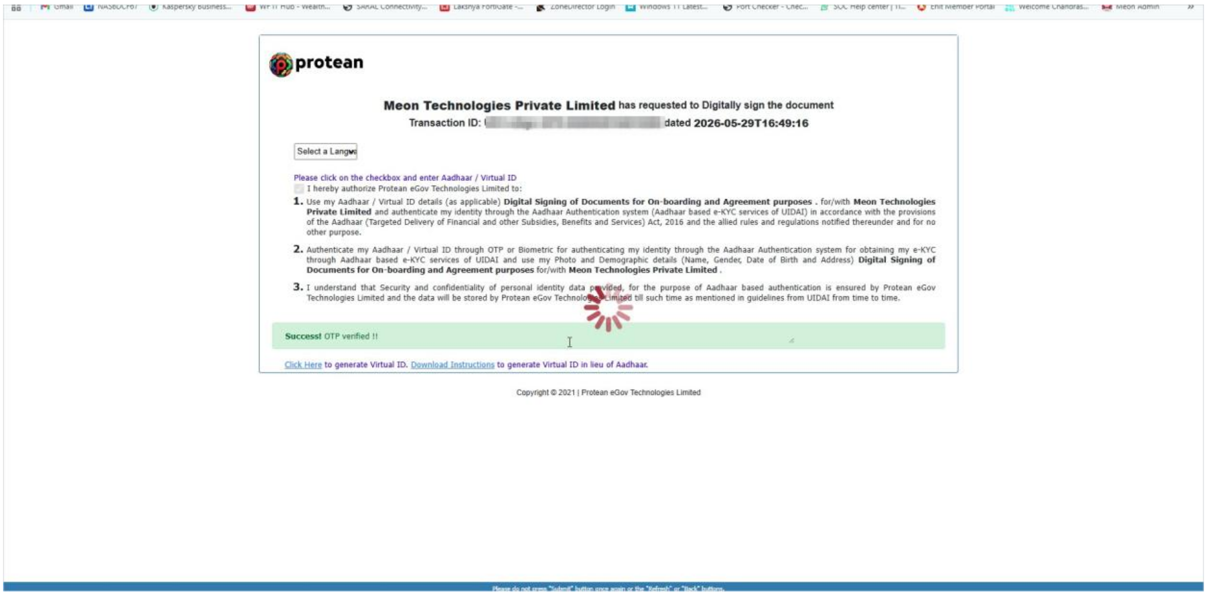
> **Tip:** Sit in a bright area facing a light source. Remove caps or sunglasses so your face is clearly visible.

Step 12 · eSign the modification documents

- Click each eSign button (e.g., KRA-PDF and reKYC-PDF) to sign the documents — sign every document presented.
- On the eSign page, tick the consent box and enter your Aadhaar / Virtual ID, then click Send OTP.
- Enter the Aadhaar OTP and submit to complete the digital signature.



Aadhaar eSign — click each button to sign the modification documents.

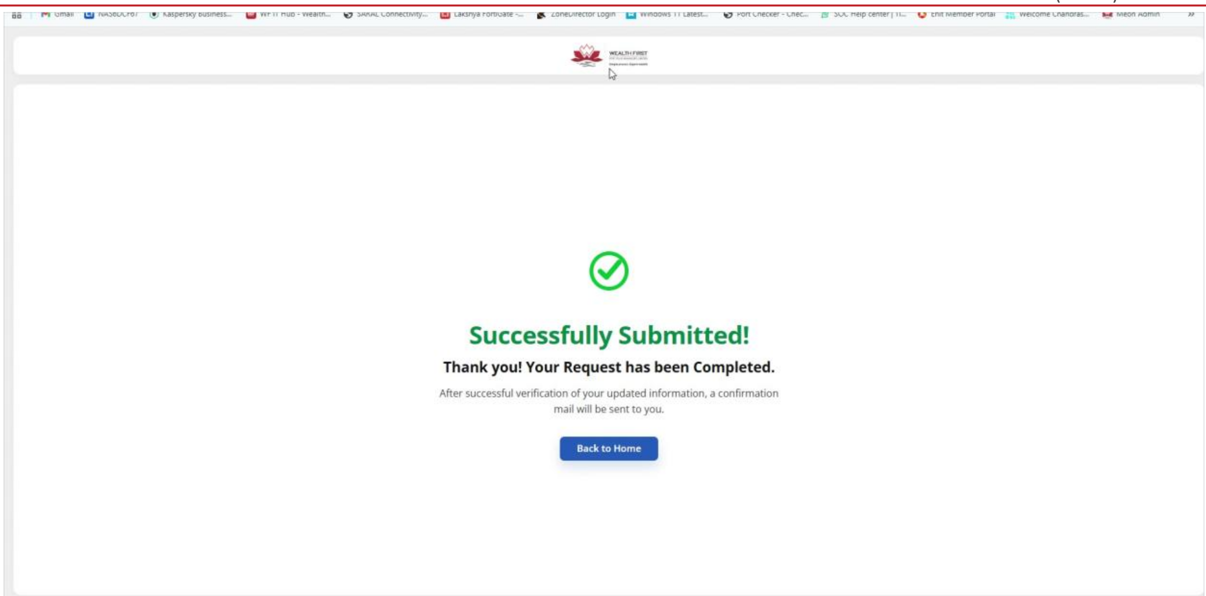


Accept the consent, enter your Aadhaar / VID and OTP to eSign.

Note: Your Aadhaar must be linked to a mobile number to receive the eSign OTP. Do not press Submit twice or use the browser Back / Refresh buttons.

Step 13 · Submission confirmation

- Once all steps are done, you will see a Successfully Submitted confirmation.
- A confirmation email is sent to you after Wealth First verifies your updated information.
- Click Back to Home to exit.



Modification request submitted successfully — a confirmation email will follow after verification.

Points to remember

- Complete the whole process in one sitting — do not refresh or close the browser midway.
- Keep your Aadhaar-linked mobile handy; it is required for both DigiLocker KYC and Aadhaar eSign.
- Each OTP is valid for a few minutes only. Use Resend OTP if needed.
- Personal details: changes to email or mobile take up to 48 hours to reflect after verification.
- Bank: link only accounts where you are the primary/secondary holder. A maximum of 3 accounts can be linked.
- Segment: select the correct exchange and segment, and confirm the tax-residency declaration.
- Nominee: choose Opt-in or Opt-out. If opting in, the total share across nominees must equal 100%.
- Other details: enter an accurate income slab, net worth and occupation.
- IPV: use good lighting and keep your full face visible; complete the capture within the on-screen timer.
- Documents: PAN and signature files must be under 5 MB (PNG / JPG / JPEG / PDF).
- eSign: sign every document presented (KRA and reKYC PDFs) — the request is incomplete until all are signed.
- You will receive a confirmation email once Wealth First verifies your updated information.

Need help?

If you face any issue during the modification process, please contact your Relationship Manager at Wealth First Portfolio Managers Ltd., or write to us through www.wealth-firstonline.com. Please keep your Client Code ready when you reach out.

— Wealth First IT Team —