Dormant Account Reactivation

Client Step-by-Step Guide

Wealth First Portfolio Managers Ltd.

Document	Dormant / Inactive Account Reactivation — Step-by-Step Guide
Prepared by	Wealth First IT Team
Applicable to	Clients reactivating a dormant / inactive trading account
Reactivation portal	modification.wealth-firstonline.com (link shared by Wealth First)
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About this guide

This guide explains how to reactivate a dormant or inactive trading account with Wealth First Portfolio Managers Ltd. through the online reactivation portal. The process is fully digital and takes about 10 minutes to complete.

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

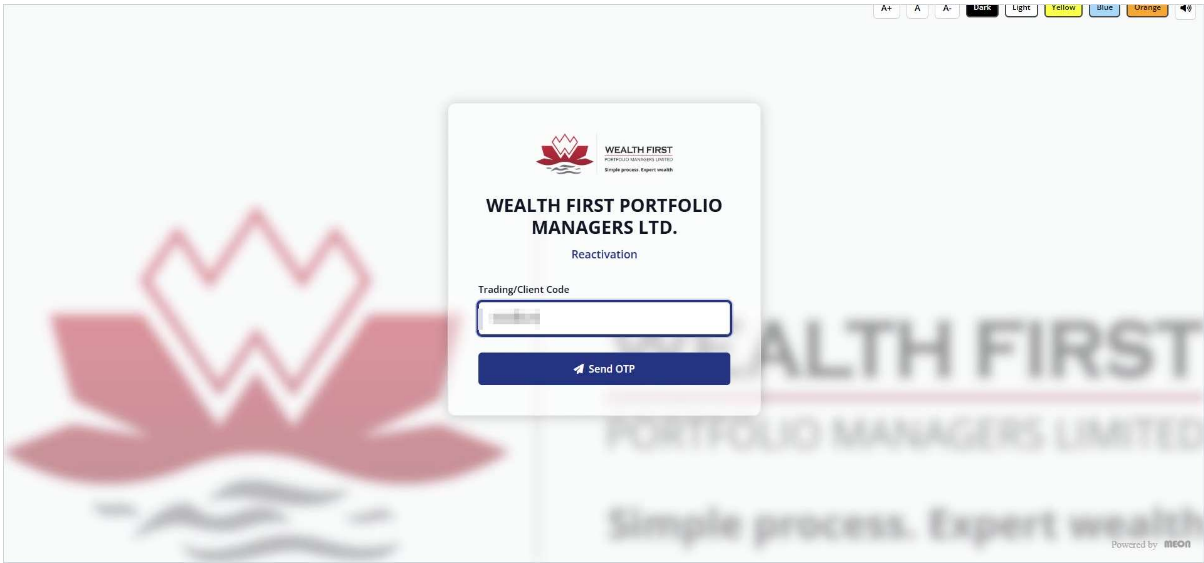
Before you begin — keep these ready

- 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).
- Your PAN and a soft copy of your signature (JPG/PNG) and PAN (PDF/JPG/PNG), each under 5 MB.
- A phone or laptop with a working camera and good lighting (needed for In-Person Verification).

> **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 phone number take up to 48 hours to reflect after verification.

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

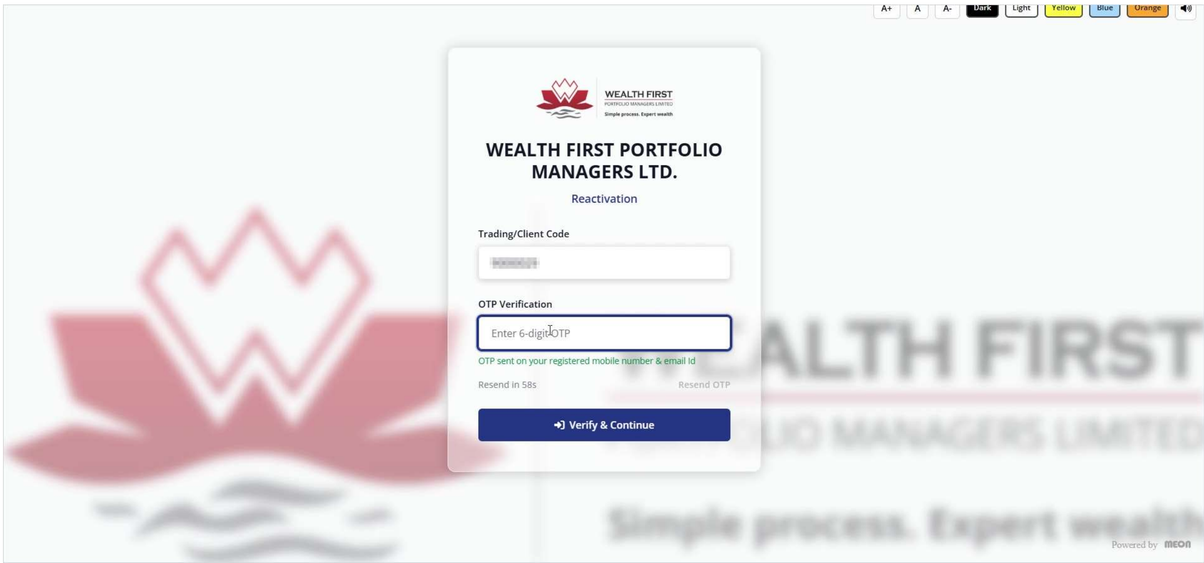
- Open the reactivation link shared by Wealth First.
- Enter your Trading / Client Code in the box.
- Click Send OTP.



Reactivation login — enter your Client Code and click Send OTP.

Step 2 · Verify the OTP

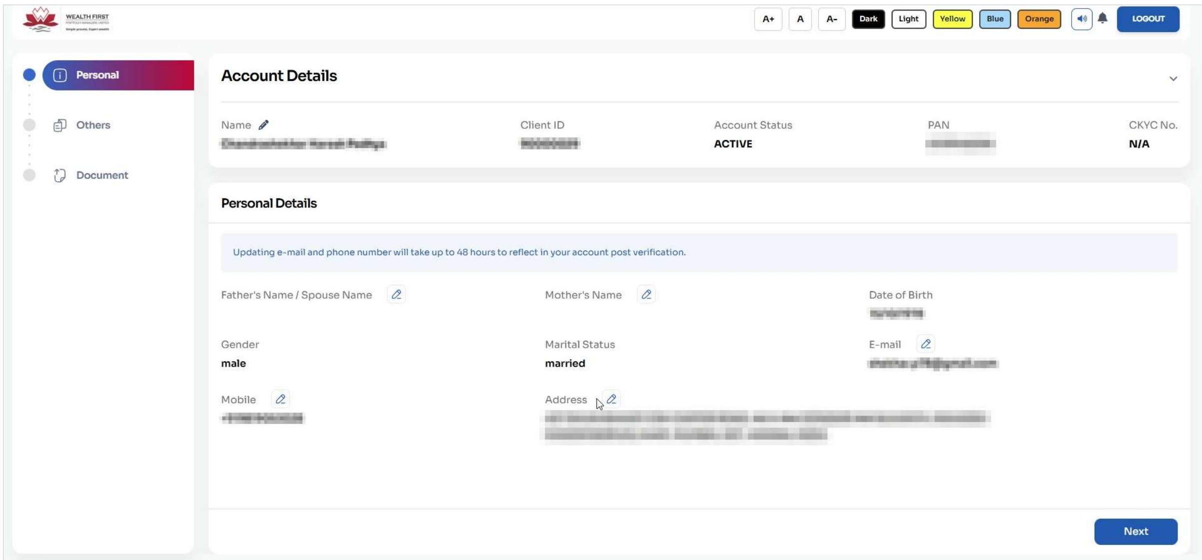
- An OTP is sent to your registered mobile number and email.
- Enter the 6-digit OTP in the OTP Verification box.
- Click Verify & Continue. Use Resend OTP if it does not arrive.



Enter the 6-digit OTP, then click Verify & Continue.

Step 3 · Review your personal details

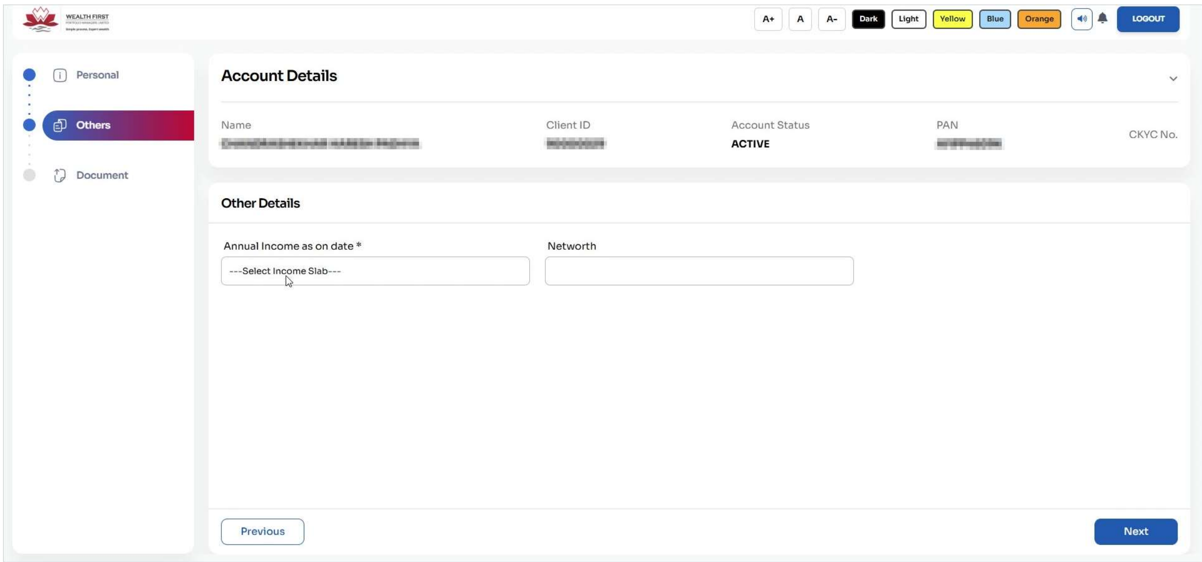
- Check your name, Client ID, PAN, date of birth, email, mobile and address.
- To change any field, click the pencil (edit) icon next to it, update the value and save.
- Click Next once the details are correct.



Account & personal details — edit any field using the pencil icon, then click Next.

Step 4 · Enter your financial details

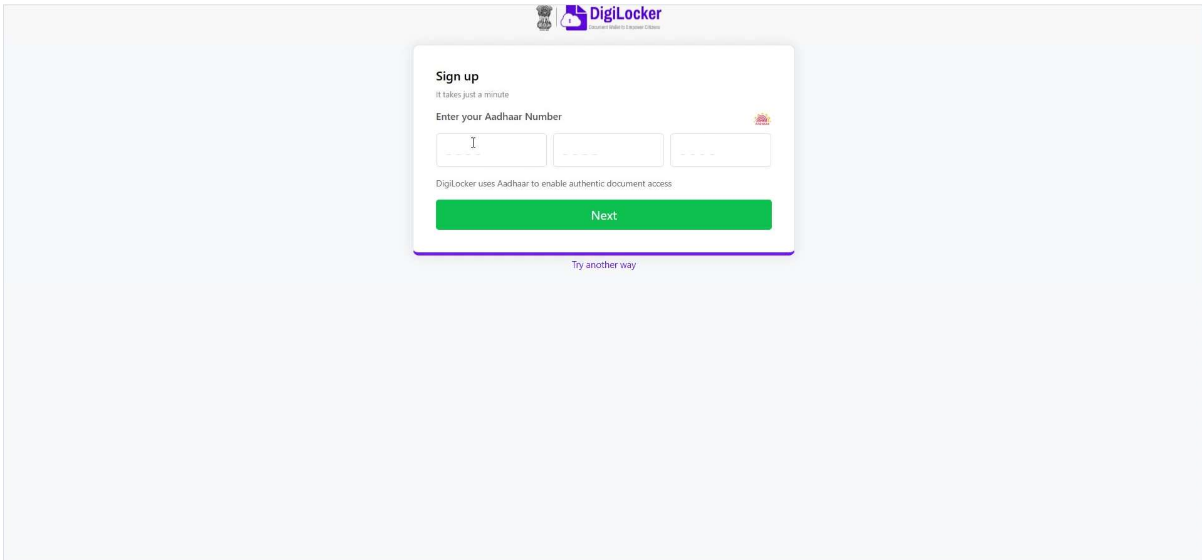
- Select your Annual Income slab from the drop-down.
- Enter your Net Worth in the box provided.
- Click Next to continue.



Provide your annual income and net worth, then click Next.

Step 5 · Complete Aadhaar KYC via DigiLocker

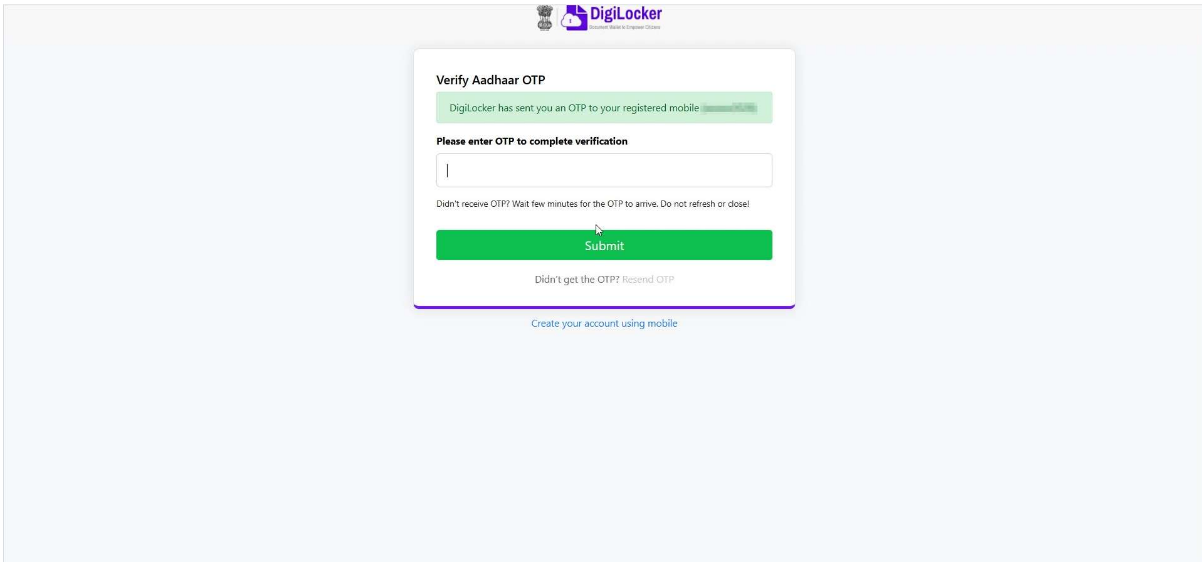
- You will be taken to DigiLocker to fetch your KYC documents securely.
- Enter your 12-digit Aadhaar number and click Next.
- If you already have a DigiLocker account, you will be asked for your 6-digit security PIN.



DigiLocker — enter your Aadhaar number to begin document fetch.

Step 6 · Verify the Aadhaar OTP (DigiLocker)

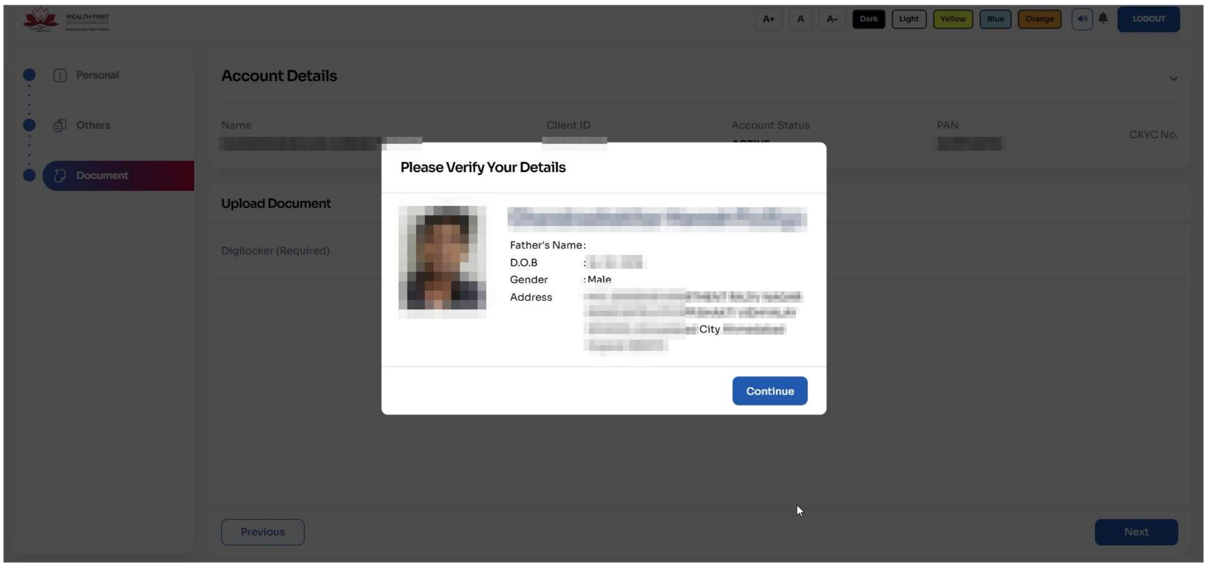
- DigiLocker sends an OTP to the mobile number linked with your Aadhaar.
- Enter the OTP to complete verification and click Submit.



Enter the Aadhaar-linked OTP to allow DigiLocker to share your documents.

Step 7 · Verify your fetched details

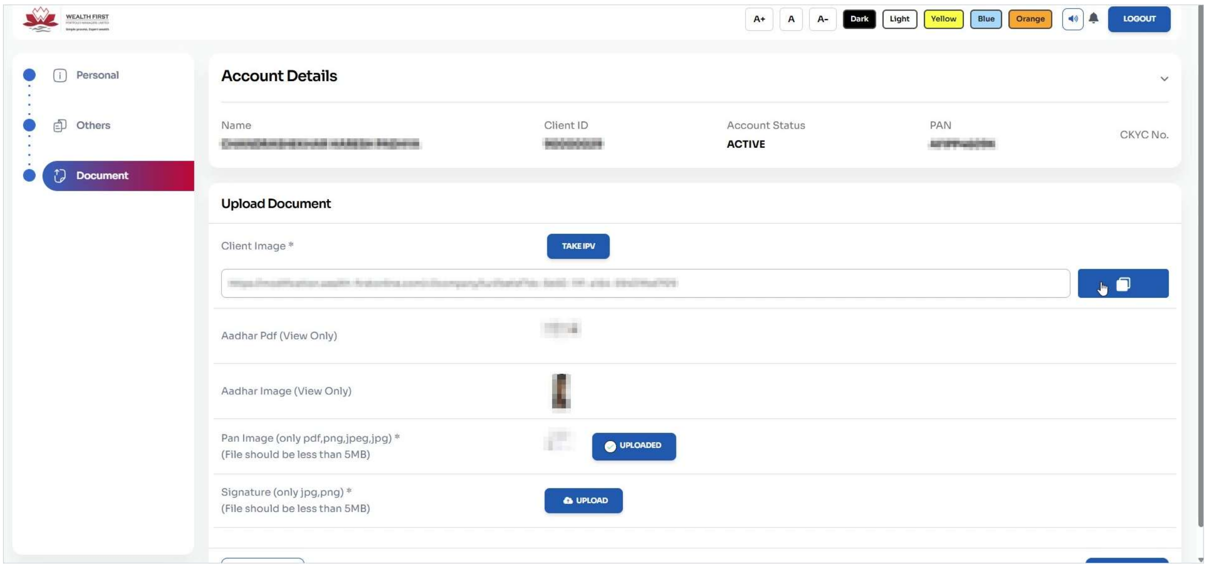
- Your photo and demographic details are fetched from DigiLocker.
- Check that the details are correct and click Continue.



Confirm the details fetched from DigiLocker, then click Continue.

Step 8 · Upload the required documents

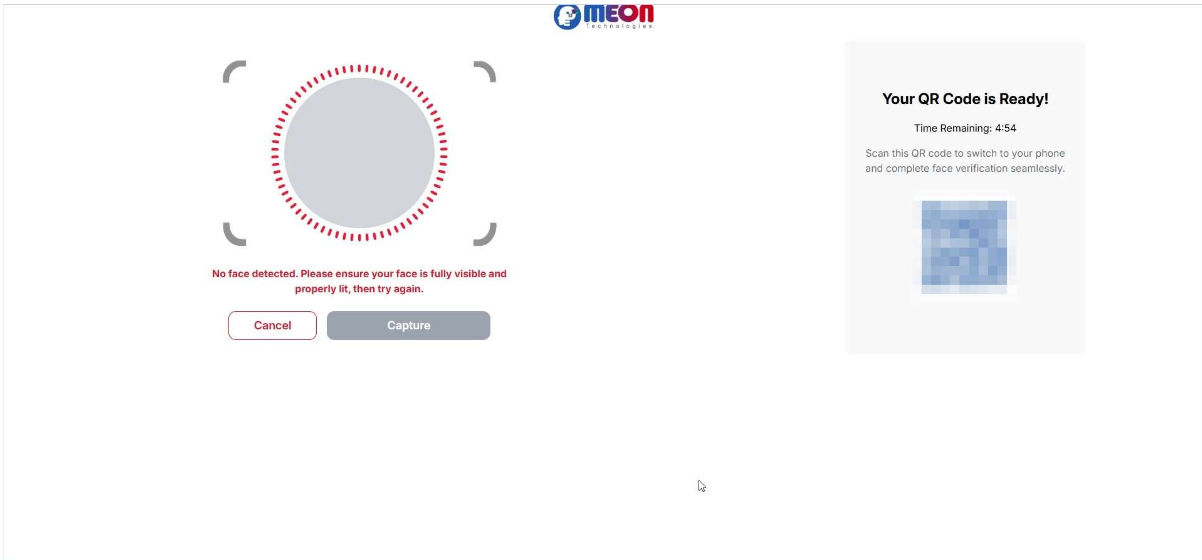
- Your Aadhaar and PAN are picked up automatically (view only).
- Upload your PAN image and Signature (JPG/PNG, under 5 MB) if prompted.
- Your live photo is captured in the next step (In-Person Verification).
- Click Next to proceed.



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

Step 9 · 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.

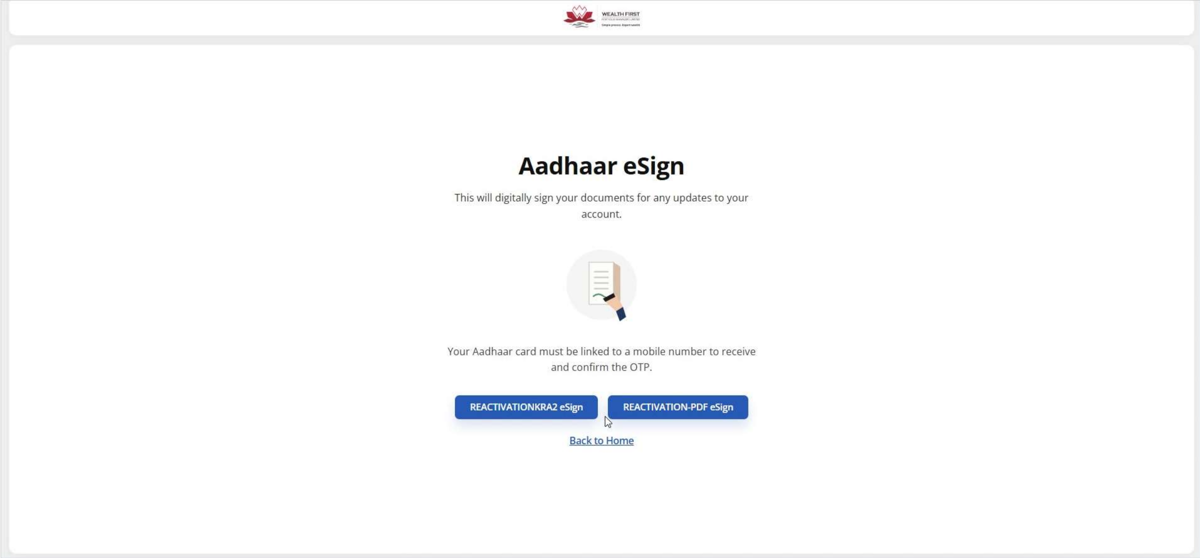


In-Person Verification — scan the QR code and capture a clear, well-lit photo of your face.

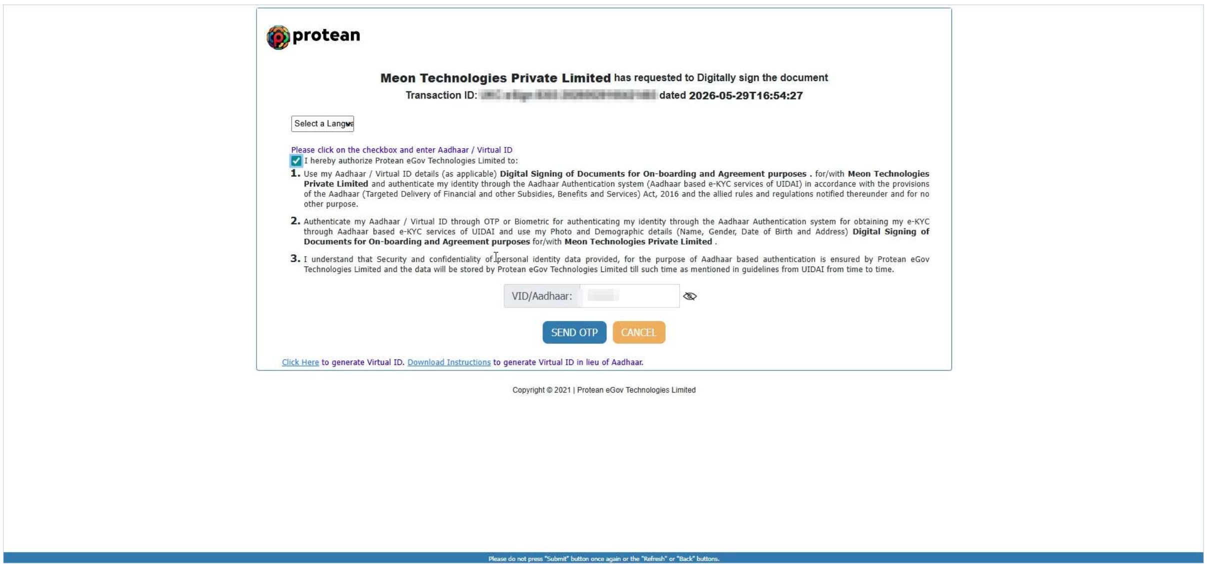
Tip: Sit in a bright area facing a light source. Remove caps or sunglasses so your face is clearly visible.

Step 10 · eSign the reactivation documents

- Click each eSign button (e.g., REACTIVATION-KRA and REACTIVATION-PDF) to sign the documents.
- 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 reactivation documents.

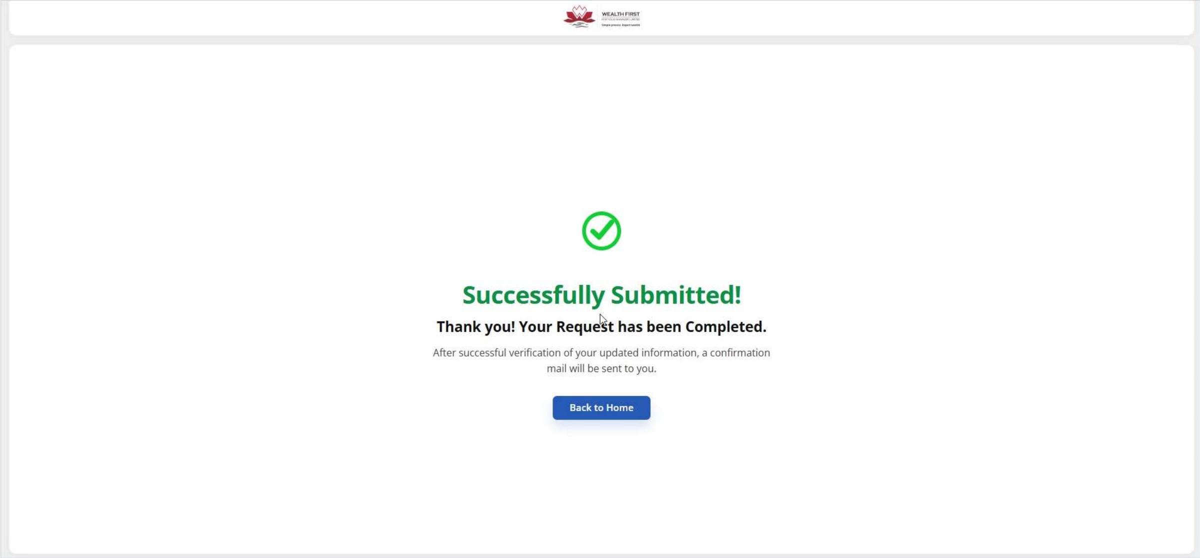


Accept the consent, enter your Aadhaar / VID and OTP to eSign.

> **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 11 · 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.



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

Important points to remember

- Complete the 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.
- For clear IPV, use good lighting and keep your full face visible.
- Updates to email or mobile number take up to 48 hours to reflect after verification.
- You will receive a confirmation email once Wealth First verifies your details.

Need help?

If you face any issue during reactivation, 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 —