

To,
KYC - Department

Date: ___/___/___

Patel Wealth Advisors Pvt. Ltd.

"OXYGEN", M/2/3, Housing Board
Opp. Pradhyuman Royal Heights,
Off Kalawad Road,
RAJKOT – 360005

Dear Sir,

Sub. : Transfer of Trading A/c No. _____

This is to inform you that I/We undersigned am/are operation the trading account with your _____ (Existing) Branch / Sub-Broker / Authorised Person. I/We wish to transfer the above trading a/c from your above Branch / Sub-Broker / Authorised Person to your _____ (New) Branch / Sub-Broker / Authorised Person. I/We also undertake to clear my/our past due if any. Hence, you are requested to take necessary action for transfer of the code at your end only. I have attached herewith required documents. Kindly take note of the above and do the needful. I also agree with Transfer charges of rupees one hundred plus Taxes.

Thanking you,

Yours truly,

Client Signature: _____

Name of Client: _____

NOC by Existing Branch/Sub-Broker/ Authorised Person

I/we have no objection to transfer the above client from me/our _____ (New) Branch/Sub-Broker/ Authorised Person. You are requested to transfer the above trading account with immediate effect.

Signature: _____

Name & Tag of Existing Branch/Sub- Broker/ Authorised Person _____

Declaration by New Branch/Sub-Broker/ Authorised Person

I/we have no objection to transfer the above client under me/us. I/we also hereby introduce the above client for dealing in Cash and/or Future & Option and/or Commodity segment of BSE,NSE or MCX. I/we also hereby agree and undertake to keep you indemnified against any claims, losses, damages, costs etc. in connection with the above client.

Signature: _____

Name & Tag of New Branch/Sub-Broker/ Authorised Person _____