

# How to complete mutual fund KYC online?

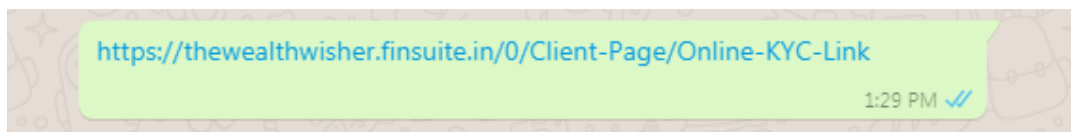
As we all aware that KYC is mandatory for Mutual Fund Investments. Now you can complete the Mutual Fund KYC online using following Link. Let me explain you the steps to complete the Mutual Fund KYC online.

First you will recive the link form us or you can click the link on our website.

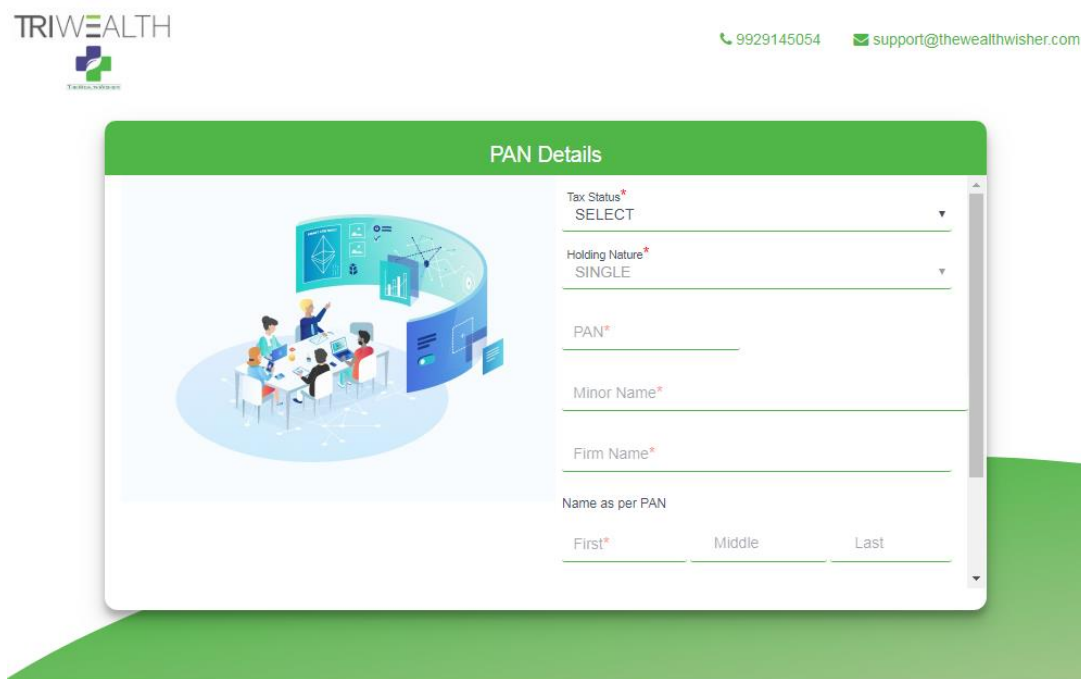
Please keep following things ready on your mobile/laptop before starting.

Images of Your Photo, your cheque (canceled), PAN, Aadhar, Signature (on white paper).

**Step - 1** First click on the below link.




**Step - 2** Once you open the link, it will ask for you to enter the PAN Details.

A screenshot of the 'PAN Details' form on the Triwealth website. The form is titled 'PAN Details' and features a green header. On the left side, there is an illustration of a group of people in a meeting. The form fields are as follows: 'Tax Status\*' with a dropdown menu showing 'SELECT'; 'Holding Nature\*' with a dropdown menu showing 'SINGLE'; 'PAN\*' with a text input field; 'Minor Name\*' with a text input field; 'Firm Name\*' with a text input field; and 'Name as per PAN' with three sub-fields: 'First\*', 'Middle', and 'Last', each with a text input field. At the top left of the page, the 'TRIWEALTH' logo is visible. At the top right, there is contact information: a phone number '9929145054' and an email address 'support@thewealthwisher.com'.

**Step - 3** The next step is to upload your PAN Card & Aadhar Card image. Please ensure that PAN card image is sharp and clear. Enter your mobile no. and email id, then click on "Next".

Document Details



DOB\*

Upload PAN

[Choose File](#)

Upload Aadhar - Front

[Choose File](#)

Upload Aadhar - Back

[Choose File](#)

Email Id\*


Mobile\*

[Prev](#)

[Next](#)

**Step – 4** Now enter your father name, mother name and your marital status.

KYC Details



Father Name

Mother Name

Marital Status\*


Married
  Unmarried
  Other

[Prev](#)

[Next](#)

**Step – 5** Now you have to provide FATCA Details. In FATCA details, you have to enter your occupation, annual income range, tax residency etc.

### FATCA Details




Nationality* INDIA	Occupation* SELECT OCCUPATI
Approx. Income* SELECT	Source of Income* SELECT
Country of Birth* INDIA	State of Birth* SELECT STATE
City of Birth*	
Politically Exposed?* <input checked="" type="radio"/> No	Tax Residence Outside India?* <input type="radio"/> Yes <input checked="" type="radio"/> NO

Prev
Next

**Step – 6** Then the next step is to provide your address details and upload the address proof. You have to submit any government approved documents such as Aadhaar Card. Do remember that, here there are two options to upload the address proof. One is front photo and second one is backside photo of your address proof.

### Address Details



Permanent / Overseas Address


Flat No/Building No/Street\*

Block/Locality*	Country* INDIA
State* SELECT STATE	PIN Code*
Address Proof Type* SELECT	City*
Address Type* <input type="radio"/> Residential <input type="radio"/> Business	Upload Address Proof - Front <span style="border: 1px solid green; padding: 2px 5px;">Choose File</span>

Proof ID No.

**Step – 7** Now you have to provide your bank account details. Then you have to upload a copy of canceled cheque or bank account statement. Make sure your name and account number is clearly visible in the image. Then click on “Next”.

### Bank Details



Account Holder Name\*

Joint Holder Name (if any)

Account Number\*

Account Type\*

Savings  Current  CC

Bank Proof Type\*

SELECT


Upload Bank Proof 1

[Choose File](#)

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**Step – 8** After bank details, you have to provide nominee Details.

### Nominee Details



Number of Nominees\*

1

Nominee Name\*

Nominee Type\*

Select Type

Nominee Relation\*

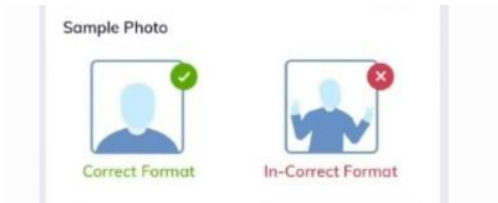
Select Nominee Relation

Nominee Percentage\*

100

Prev Next

**Step – 9** Next step is to upload your image and signature.



9929145054

support@thewealthwisher.com

A screenshot of a web form titled "Photo & Signatures". The form has a green header bar with the title. Below the header, there is a large illustration of a group of people sitting around a table in a meeting room, with various charts and graphs on the wall. To the right of the illustration, there are two sections: "Upload Photo" with a "Choose File" button, and "Signatures" with two radio button options: "Sign & upload" (which is selected) and "On Screen". At the bottom of the form, there are two green buttons labeled "Prev" and "Next".

**Step – 10** For in-person verification purpose, you are required to upload the fifteen seconds video.

In video please Say the number visible on the screen.


Do not shake the camera/phone.

Be in center. You should be visible all time.

Be seated while recording. Do not walk or move.


Continue even if you say numbers before 15 seconds as automaticall video will stop recording after 15 seconds.

### Video Recorder



Record your video & say the below digits loudly. Note the video will automatically stop recording after 15 seconds.

251497




Start

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After this, your part of KYC will be completed.

### Welcome Aboard!



Congratulations! You have completed the form Successfully