

Dear Client,

This is with reference to CDSL/NSE/BSE requirement of providing online closing facility, intimating client regarding the said facility and publishing online account closing procedural guide/guidance, we here by inform that we are providing online account closure facility for NSE/BSE/CDSL and Account shifting facility for CDSL Demat account holders.

You are required to visit our website <https://maxbroking.com/> and Go to LOGIN menu and Login with your credentials. After Log-in , you will find, Left hand side, Menu, wherein Select Request and in that "ACCOUNT CLOSURE".

Upon Selection of Account Closure, you will be shown the active exchange/segment and CDSL account. To close your account, you have to select the appropriate option and in case of Account shifting , you are required to mentioned details of Depository and DP ID and upload the client master.

After successful placing of request, you will see on right side, your request status.

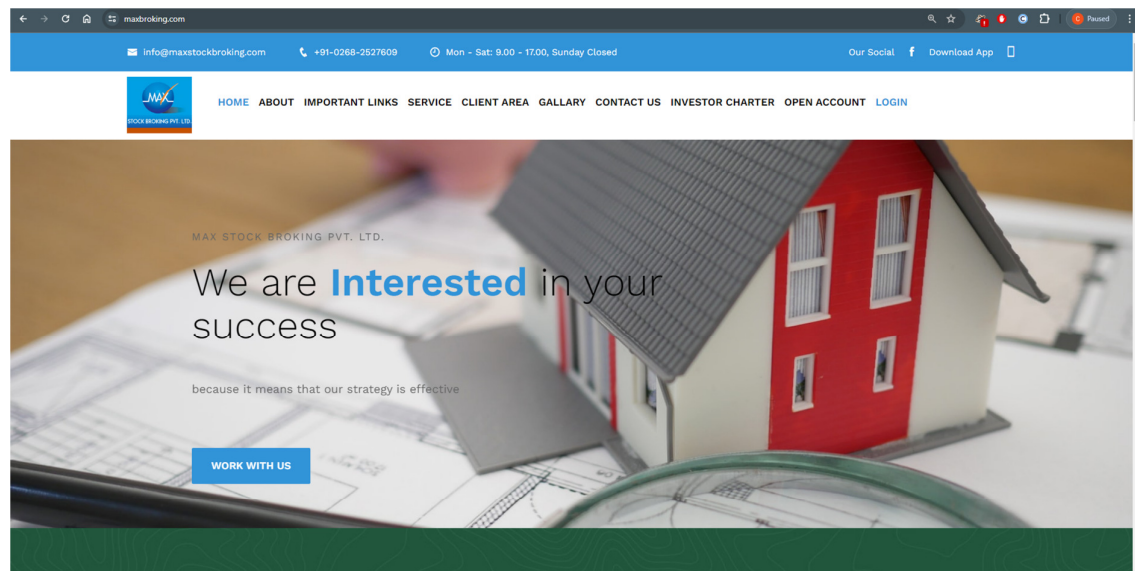
Immediately, upon receipt of the request, your request shall be processed within 2 working days, If all formalities and documents for account closure/shifting are in proper compliance and have paid all the dues to us.

Kindly take note of above.

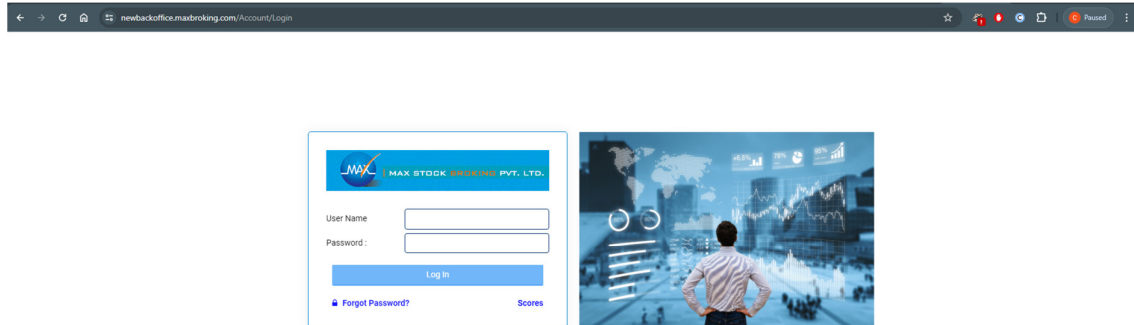
Detailed process is as under;

## **ONLINE ACCOUNT CLOSING PROCEDURE/GUIDE**

Go to our Website : <https://maxbroking.com/>



Go to LOG IN menu and Insert USER NAME & PASSWORD provided to you.



After Log-in , On left side, you will see the Request Option, Select the request Option under which you will find Account Closure. The same is valid for Account shifting cases.

**Client Dashboard**

10008 - HIREN MUKESHBHAI PATEL

Branch	HO	Father/Spouse Name	MUKESHBHAI PATEL	Open Date	22/04/2009
Sub Branch		Annual Income	Between Rs. 5 to 10 Lac	Last Traded Date*	09/05/2023
RM/TL		PAN	AUGP7767H	Income Date	(17/05/2023)
Gender	Male	Date of Birth/Incorporation	02/07/1984	Last Sett. Off Date	05/04/2024
Group Code		Mobile No	7096522268	KRA Status	
Email Id	hiren@maxstockbroking.com	Aadhaar No	XXXXXXX 7516	CKYC No	60021862065380
Payment Mode		Client Status	Active	KRA	N
Address	S/GHRIPAL NAGAR DODIETV/OPP: HIRDEV HOSPITAL/NADIAD 387001,NADIAD,387001,Ujheka,Gujarat	Client Status	Active	CKYC Date	
Trading Software	NONE	Net worth	FATGA*Flag: N	Nominee Opt. Selection	N
Modify Remark				MTF Status	N

**Financial Summary\***

Financial Balance	Other Deposit	Margin Pledge	Pledge Limit	Cash Margin	Margin Due	Free Funds
-2,31,430.56	0.00	0.00	0.00	0.00	0.00	-2,31,430.56

Once you click, the Account Closure, You will see, Active Segment details and active demat account details. In case you have to change /close for particular segment or demat account, you are required to switch the blue button to grey.

Further in case of Account Shifting ,you are required to Select Counter Depository viz. NSDL or CDSL and then Insert DP ID and BO ID and upload the client master. Further if any remarks are to be placed, please give the same in Remarks BOX. Then continue to complete the Process.

The screenshot shows a web application interface for MAX STOCK BROKING PVT. LTD. The page title is "Segment Detail: Change segment details." The user is logged in as "Hello HIREN MUKE...". The interface includes a sidebar menu with options like Dashboard, Reports, Holding, Net Position, Financial, RMS, Request, Buy Back, ACH Request, Margin Pledge, KYC Modification Request Letter, Account Closure, RE-KYC/Modification Request, Unpledge, Download, and CDSL Reports. The main content area contains a "Segment Detail" section with a "Change segment details." sub-section. It lists various segments with toggle switches: Equity (ON), FNO (ON), COM (OFF), CUR (OFF), MF (OFF), and CDSL (00000024) (ON). Below this, there are checkboxes for NSDL and CDSL, input fields for DP ID and Client ID, an "Upload file" button, and a "Remark" text area. A "CONTINUE" button is at the bottom right. To the right of the "Segment Detail" section is a "Pending Request:" table with columns for ReqDate, ExchangeID, SegmentID, and Remark.

On Right hand side, you will see your request status. In case , all formalities (document in case of Account Shifting Cases) are properly followed and all dues are properly paid, you account closure request shall be processed within 2 days.