

PROCESS NOTE FOR SIGNING UP ON CLERK AND CLERK FINVEST

1. Download the **Clerk and Clerk Finvest** Mobile App by scanning the QR Code below.



Scan for Android devices



Scan for iOS devices

2. Click on the **'Profile Details'** option in the left menu and update the details like Name, DOB, Email, Mobile, Occupation, Mobile Relation and Email Relation. Now click on **'Save & Continue'**.
3. Below the **'Save & Continue'** button, click on **'Contact Details'** and fill the Address , Pincode, City and State. Now click on **'Save & Continue'**.
4. Below the **'Save & Continue'** button, click on **'Bank Details'** and update your Bank IFSC Code, Bank Account Number, Bank Account Type and Bank Name. Now click on **'Save & Continue'**.
5. Below the **'Save & Continue'** button, click on **'Additional Info-Nominee Details'** and fill the Nominee Name, Relationship with Nominee, Nominee Applicable %, Nominee DOB and Nominee PAN. In case the nominee is minor, Guardian's Name is additionally required. Now click on **'Save & Continue'**
6. Now click on **Upload Docs** and upload your Cancelled Cheque copy in JPG or PNG Format.
7. **You will now receive a mail from NSE on IIN account creation, Kindly click on the link and authenticate it.**
8. **Also you will receive another mail on FATCA approval. Please do click on the mail received and authenticate it.**
9. **Post this step, kindly wait for a confirmation mail from NSE to start your investments in Mutual Funds.**
10. **In case you want to start an SIP, click on 'Register Mandate' in the left main menu.**
 - a. Enter mandate amount for the amount you wish start the SIP.
 - b. Choose the Bank account from where you wish to get the SIP amount debited
 - c. Process Mode – Select **eMandate**.
 - d. You may select Channel Type as Net Banking or Debit Card as per your convenience. You will need the details of the same to login and authenticate.
 - e. Now click on **'Submit'**. You will now be redirected via NPCI portal to your respective bank's website for Mandate authentication.
 - f. Verify the details, click on the checkbox and click on **'Submit'**.
 - g. The portal will now redirect you to the Net Banking page of your bank for authentication. Once you enter the details and authenticate, the mandate will be setup.

You are now ready to set up your SIP! For any assistance, kindly call +91-7019832456.