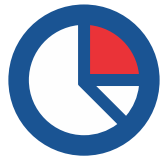


Personal Finance Organizer

Belongs to: _____

*The world is full of uncertainties. Record
all your financial information at one place for
your family.*





Equity

Seamless trading platform for NSE & BSE with linked Saving, Trading & Demat account for hassle free investments.



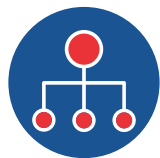
Thematic Portfolios

A basket (smallcase) of exchange traded securities (like stocks & ETFs) in a specified weighting scheme to reflect a certain objective (ideas, themes, strategies). These are modern investment products that help you build a diversified, low-cost & long term portfolio.



ETFs

Invest in Exchange Traded Funds, which are baskets of stocks, bonds or commodities (gold) wherein the current trading value is derived from the Net Asset Value (NAV) of the underlying stocks / commodities.



Derivatives

Take positional trade to either hedge your portfolio, or to benefit from sharp movements in the relevant financial instruments. With us, you can trade in Equity, Currency & Commodities Derivatives.



Mutual Funds

Invest, transact anytime, anywhere through our online trading platform or Mobile App and avoid paperwork.



Fixed Income

We offer a range of Fixed Income Investment options like NCD/Bonds and Corporate Fixed Deposits.



Insurance

Distributor for various risk cover policies of Life & non-Life to protect themselves from contingencies



Loans

Distributors for various loans like Home, Auto, Loan against Securities, Personal & Education loans.



NPS

National Pension Scheme is a contribution based retirement scheme regulated by PFRDA, which is backed by Govt. of India. It helps you build a retirement corpus in a systematic manner during your working life.

Important Contacts

	Name	Contact Number	Email ID	Office/Residence Address
Tax Consultant				
Insurance Agent				
Stock Broker				
Mutual Fund Agent				
Advisor				
Others				

PAN Card Details

Name	Father's/Husband Name	PAN Number	Login ID & Password for IT Return

Aadhar Card - UID Details

Name	Aadhar Card Number	Linked Mobile Number

Passport Details

Name	Passport Number	Issue Date	Expiry Date	Issuing Authority

Driving Licence Details

Name	Licence Number	Valid Till	Issue Date	Issuing Authority

Ration Card Details

Name	Ration Card Number	Address in Card	Names Included

Election Identity Card Details

Name	Father's/Husband Name	Identity Card Number	Issue Date

Bank Details

A/C Holder Name	Bank Name	Branch	Type of A/C	A/C Number	Operating Ins*	Nominee	Linked Mobile No.

Note: Operating Instructions means - Single / Joint / Either of Survivor / Anyone Or Survivor

Locker Details

Bank Name	Branch With Contact Details	In the Name Of	Code / Locker No.	Rent	Rent Renewal Date	Nominee	Contents

ATM/Debit Card Details

Card Holder Name	Bank Name & Branch	Bank A/C Number	Card Number	CVV No.	Valid Till	Linked Mobile No.

Credit Card Details

Card Holder Name	Card Name	Card Number	CVV No.	Valid Till	Linked Mobile No. & Bank

Location Of Important Documents

	Location
<i>Insurance Policies</i>	
<i>Investment Papers</i>	
<i>Property Papers</i>	
<i>Birth Certificate</i>	
<i>Marriage Certificate</i>	
<i>Domicile Certificate</i>	
<i>Important Agreements</i>	
<i>Self / Spouse's Will</i>	
<i>Locker Key</i>	
<i>Other Important Papers</i>	

Demat Accounts

A/C Holder Name	Demat A/C No.	Bank / DP Name	Held Single / Jointly	Nominee	Bank A/C Linked

Mutual Funds

Holder Name	Fund / Scheme Name	Broker / Direct	ISIN(Physical / Demat)	Customer ID	Plan / Option	Nominee

Bonds/Debentures

Bonds Description	Issuer	ISIN(Physical / Demat)	Coupon Rate	Coupon Frequency	Maturity Rate	Nominee

House Property / Land Property Details

Property details & in Name of	Share Certificate No.	Registered No.	Nominee	Insurance Details	Details of Mortgage with Bank

Pension Account

Bank Name / Branch	Types of A/C & No.	Operating Ins*	Pension Payment Order No.	Nominee	Due Date For Live Certificate

Note: Operating Instructions means Single / Joint / Either of Survivor / Anyone or Survivor

Fixed Deposit / Recurring Deposit / Company Deposit

Holder Name	Bank / Co. Name	Branch Deposits	FDR No.	Date of Deposit	Date of Maturity	Interest Payout	Amount	Nominee	Loan / OD Availed

Life Insurance

Policy Name	Policy No.	Amount Insured	Issue Date	Maturity Date	Insured	Annual / One Time Premium	Nominee	Agent/Direct

General Insurance (Health / Vehicle)

Policy Name	Policy No.	Floater / Individual	Amount Insured	Issue Date	Renewal Date	Premium	Remarks*	Agent / Direct

Note: Important details to be put in remarks ex: For 'Vehicle Insurance', put the details of car (Model Number, Chassis Number, Engine Number, Year of Manufacturing).

Will & Debt Details

Will - Last Will Dated (__ / __ / ____)

	Name	Give Complete Details with Contact Number
Executor		
Witness		
Power Of Attorney		

Debts / Liabilities / Loans

	Debts / Liabilities / Loans	Complete Details	Details of Security Kept
I have borrowed from	1)		
	2)		
	3)		
I am Guarantor of	1)		
	2)		
	3)		
Other Liabilities	1)		
	2)		
	3)		

Income Tax Details

PAN No.	Ward No.	Office Address	File No.



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Central Dealing Desk

Contact our central desk for direct assistance.
Call **3355 3366** (prefix local code)



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Our dedicated Relationship Managers offer complete investment assistance.



ProTerminal

An uber-efficient platform which equips you with the necessary information to trade like a pro. ProTerminal gathers market related news using advanced algorithms & tracking tools which helps you to arrive at accurate market decisions.



Digify

A 100% digital platform for quick & hassle-free Mutual Fund investments online. Apart from ease of investing, this online mutual fund platform also ensures that you can access your portfolio, manage and track your investments and withdraw them anywhere, anytime.



InvestNow

Invest in Mutual Funds through HDFC Bank NetBanking. No lengthy form to invest in MF, Single click payment, Expert Recommendations, Financial Planning & Advance Portfolio to track your investments.

Help Your Family When They Need It Most



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www.hdfcsec.com/create-will-online