

## Online Demat Account Closure (With Holding) Process Flow:

### Closure Page:

- The client must pick the reason for closing the Demat account and enter the UCC code/DP reference number on the Closure page.
- When the customer clicks the "**Check Eligibility**" button, Istaa will send a four-digit OTP to the registered mobile number and email address to verify the information they supplied.
- If in the case OTP is not received after 60 second, client can click on "**Resend OTP**" to send the OTP again.
- If the OTP entered by the client is invalid, system throws message saying that the "**OTP is invalid**". Client can re-enter the OTP or else can wait for 60 seconds and click on "**Resend OTP**".
- After inputting the OTP, Client needs to click on "**Client Login**" button.

### Personal Information:

- Next processes after mobile and email verification is "**Personal Information**" where the client can view the personal information i.e., Name, UCC Code, BO ID, PAN Number.
- Furthermore, the client can select whether to close their Demat account, their Trading account, or both.
- Accordingly, Client needs to select which account they need wants to close. And clicking on "**Proceed to close Account**" client can proceed to **eSign**.

### Documents Upload:

- Next processes after Personal Information is "**Documents Upload**" where the client has to upload his/her signature along with counter Demat account CML copy as well. And clicking on "**Proceed to submit signature**" client can proceed to **eSign**.

### eSign Process:

- On Clicking "**ESIGN**" a pre-filled account closure form will open in front of client.
- Client can reassess the Account Closure Form and then proceed to e-Sign.
- On Clicking "**Proceed to eSign**" a panel will open in front of client. The panel which is opened is inter mediatory panel of the eSign vendor i.e **Digio, Leegality, True Copy** and then redirected to **NSDL** site.
- In case of **NSDL eSign** it will redirected directly to **NSDL site**.
- On **NSDL** site client has to enter 12 Digit Aadhaar or VID i.e Virtual ID and click on Send **OTP**.
- **OTP** will be sent on mobile registered with **UIDAI site**.
- After 60 second client gets option of "**Resend OTP**".
- In Case of invalid OTP 3 attempts are given and after 3 failed attempt they need to send new request again and follow the same process.

### eSign Complete:



Your E-Sign process is completed.

## Online Demat Account Closure (Without Holding) Process Flow:

## Closure Page:

- The client must pick the reason for closing the Demat account and enter the UCC code/DP reference number on the Closure page.
- When the customer clicks the "**Check Eligibility**" button, Istaa will send a four-digit OTP to the registered mobile number and email address to verify the information they supplied.
- If in the case OTP is not received after 60 second, client can click on "**Resend OTP**" to send the OTP again.
- If the OTP entered by the client is invalid, system throws message saying that the "**OTP is invalid**". Client can re-enter the OTP or else can wait for 60 seconds and click on "**Resend OTP**".
- After inputting the OTP, Client needs to click on "**Client Login**" button.

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