

The Ultimate Checklist for Investors to get started with their investments with assistance of Taresh Bhatia

In this note, I will go over the 10 essential steps that you should put together, including Aadhaar Card, KYC form, PAN Card, and more.

Note: please check my other document to Link/ update PAN, Aadhaar, to your mobile, email etc.

1. **Aadhaar Card:** Please download your new masked Aadhaar card, print, sign self attested and send me
2. **PAN Card:** Please download your PAN Card print, sign self attested and send me
3. **A copy of your cheque,** (from which you wish to start your investments from only) clear copy. Your name spelling should match with PAN and aadhaar. . In this cheque please cross check again for your name, First name, last name as per Aadhaar card only.
4. **Download this KYC form** here <https://www.camskra.com/CKYC-Individual%20Form.pdf>. **Fill up this form with following instructions clearly with no changes:**Your name should match including each alphabet or spelling should match with PAN and aadhaar. Your address should match with the Aadhaar card. Your fathers' name / spelling should match with PAN Card details. In this form please fill very carefully like your name, First name, last name as per Aadhaar card only and inside given boxes. No change from PAN/ Aadhaar. Paste your latest passport size photo on top given box and sign across.
5. **Send me this form** along with your (self attested each) PAN,Aadhaar. You can first send copy on my WhatsApp and then courier to **my office address** here;
6. Taresh Bhatia, 107, Qutab Plaza Market Complex (Near SBI Bank, 1st floor), DLF Phase 1, Sector 26, Gurugram, Haryana 122002. Landline: +911244056398 (for location help) Google map: <https://bit.ly/Taresh-Office-Google-Map>
7. **Please fix a call/ video call with Taresh** for any clarification:<https://calendly.com/taresh/brief-talk>. Or <https://calendly.com/taresh/videocall>