

Account Opening Process

Physical Process for opening the Account

Visit our Office/Download the form from website www.cnbfinwiz.com

Following steps should be followed by the Client:

1. Fill the form.
2. Enclosed the required documents.

Following steps shall be taken by Company:

1. Form & Documents Verification by Company.
2. IPV done by CNB Staff.
3. Client Copy Handover to Client.
4. Welcome Letter, DIS & Client Master provided to Client after Account Opening.

COMPLAINT ON THE DESIGNATED EMAIL IDS

Go to **www.cnbfinwiz.com**
(Two ways to raise the complaint)

Click on **CONTACT US** available on the right Hand side of the Home Page

EscalationMatrix

Will be opened

Complaint initially can be raised on the **Customer Care/Client Servicing** E-mail Id to **Ms. Komal** at **customerservices@cnbfinwiz.com**

If Complainant is not satisfied with the solution then complaint can be raised to **Mr. Shyam Sunder, Head of Customer Care & Client Servicing** at **grievance.ops@cnbfinwiz.com**

If the Complainant is still not satisfied with the solution then they may raise their complaint to **Mr. Paras Sharma, Compliance Officer** at **cs@cnbfinwiz.com**

If the Complainant is still not satisfied with the solution then they may raise their complaint to **Mr. Naman Bagri, Chief Executive Officer** at **grievance.md@cnbfinwiz.com**

One can also reach us through **GET INTOUCH** facility available on the HomePage

GETINTOUCH facility can be seen on the right hand side of the Screen

Enter Details such as (Fullname, Valid Phone number, ValidEmail Id, issue/message in the space provided)

Complaint ReferenceNumber will be generated on the mail address of the complainant (Which can be used to track thecomplaint)

In absence of response/complaint not addressed to your satisfaction, you may lodge a complaint with:

1. SEBI at <https://scores.sebi.gov.in/>
2. NSE at <https://investorhelpline.nseindia.com/NICEPLUS/>
3. BSE at <https://bsecreg.bseindia.com/ecomplaint/frmlInvestorHome.aspx>
4. CDSL at <https://www.cdslindia.com/Footer/grievances.aspx>
5. MCX at <https://www.mcxindia.com/Investor-Services>

Please quote your Service Ticket/Complaint Ref No. while raising your complaint at SEBISCORES/Exchangeportal/DepositoryPortal.