

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 Hand over 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

Escalation Matrix
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 IN TOUCH** facility available on the Home Page

GET IN TOUCH facility can be seen on the right hand side of the Screen

Enter Details such as (Full name, Valid Phone number, Valid Email Id, issue/message in the space provided)

Complaint Reference Number will be generated on the mail address of the complainant (Which can be used to track the complaint)

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

1. SEBI at <https://scores.gov.in/scores/Welcome.html>
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>

Please quote your Service Ticket/Complaint Ref No. while raising your complaint at SEBI SCORES/Exchange portal/Depository Portal.