



Policy for Common Mobile number and Email id for multiple accounts

OBJECTIVE

The objective of this Policy is to establish a framework for capturing, validating, monitoring and maintaining mobile numbers and email addresses of clients of **Sanchit Financial & Management Services Limited** ("SFMSL" / "Company") in compliance with applicable requirements prescribed by the Securities and Exchange Board of India ("SEBI"), Stock Exchanges and other applicable regulatory authorities.

The Policy is intended to ensure that:

- a unique mobile number and email address is captured for each client as the normal practice;
- common mobile numbers and/or email addresses are permitted only in specifically permitted exceptional circumstances;
- appropriate client consent and documentary evidence is obtained for such exceptions;
- appropriate system-level controls are maintained;
- client records remain accurate and up to date; and

adequate records are available for audit, inspection and regulatory review

As per the SEBI circular and Depository Circulars, Depository Participants and Stock brokers need to upload unique mobile numbers and email addresses for each client. Clients can only update unique mobile numbers and email IDs in their Demat or Trading Account.

As per Policy Sanchit Financial and Management services limited shall ensure that separate mobile number and email address are captured for each client (new as well as existing). However, under exceptional circumstances, the Sanchit Financial and Management services limited may, at the specific written request of a client in a prescribed Format (Family Declaration Form), upload the same mobile number or email address for more than one client, provided that such clients belong to one 'Family' ('Family' for this purpose has been defined as self, spouse, dependent children and dependent parents). Upon receipt of such request from the client, Sanchit Financial and Management services limited will update the "family flag" in respective client account.

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