

KEYNOTE

1. The Keynote Back Office Executive meets with the client and conducts the In-Person Verification (IPV).
2. The Back Office Executive gets the KYC filled up by the client and collects the supporting documents and verifies them against the originals
3. Let's now have a look at the various types of accounts and a detailed look at the Proofs that need to be submitted to open a Keynote account:

Type of Account	Detailed List of Required Proofs
Individual Account via Physical Mode	Click to View List
Non-Individual Accounts	
HUF Account	Click to View List
Corporate Account	Click to View List
Trust Account	Click to View List
LLP Firm Account	Click to View List
Partnership Account	Click to View List

4. The Office verifies the potential customer's KYC documents.
5. Next, the office punches the potential's basic data into the Keynote systems.
6. The Office verifies the KYC and rejects/processes.
7. If the KYC is found to be valid, the backend team does data entry into the system and the Keynote account is opened.
8. Lastly, the Account Opening Kit is sent to the customer's address.

Account Opening Flowchart – Physical and Non-Individual Accounts

