

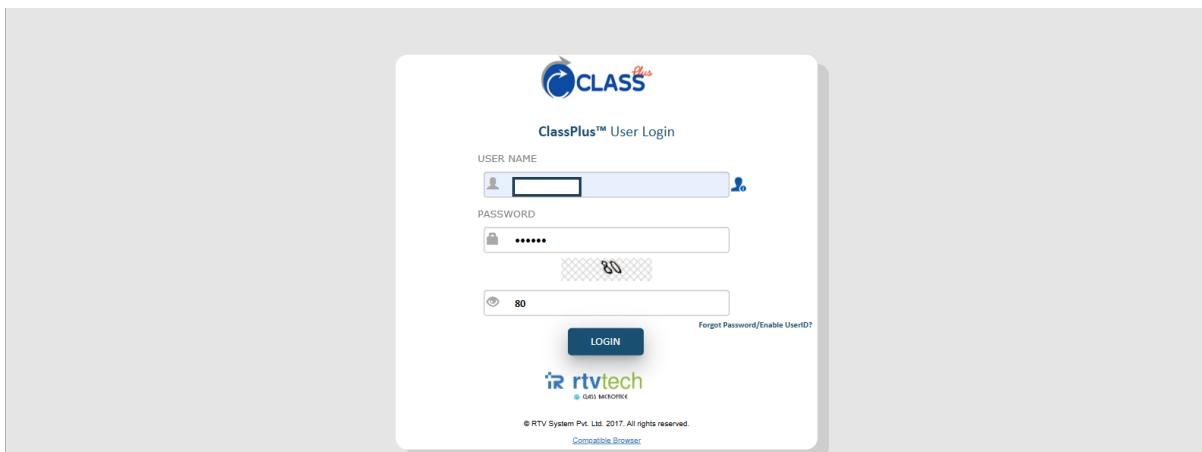
User Guide: Online Account Closure Process (Anand Rathi)

Introduction

This document provides a step-by-step walkthrough for closing your Trading and DP accounts via the Anand Rathi online portal.

Step 1: Access the Login Portal

- Anandrathi.com > scroll page > at the end of the page > Backoffice > Navigate to the Anand Rathi ClassPlus login page.
- Enter your **Client Code**, **Password**, and the **Captcha**.
- Click **LOGIN**.



Step 2: client can see the existing details of the client from that page client can do skip or click on verify submit option

Skip
Need Assistance call us : 1800420004

Trading Code: Personal Details:

PAN number
DOB
Name of Account Holder
Account Status
Mobile
Relation with Mobile
Email
Relation with Email
XXX
CNIC
FATCA/CRS
Annual Income / Date:
Commodity Client Category

S.No. Bank Name
1 KOTAK MAHINDRA BANK LIMITED
2 STATE BANK OF INDIA
3 HDFC BANK
4 ICICI BANK

Permanent Address

PAN number
DOB
Name of Account Holder
Account Status
Mobile
Relation with Mobile
Email
Relation with Email
DP (Single/ Joint)
DP Type
Nominee Registration
DP Scheme
Annual Income :
DP Dues

S.No. Bank Name
1 KOTAK MAHINDRA BANK LTD

Permanent Address Correspondence Address

Deny Deny Deny Deny Deny Deny Deny Deny

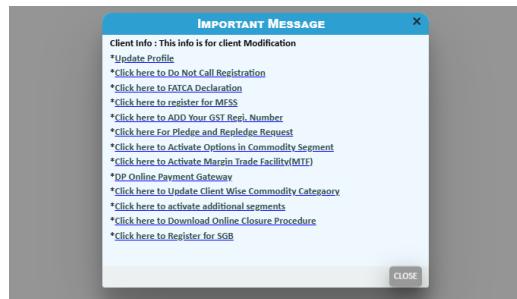
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Deny

Verify and Submit

Step 2: Navigate to Profile Update

- After logging in, an "Important Message" window will appear.
- Select the link for **Update Profile**.



Step 3: Select Account Closure Menu

- In the "All Settings" sidebar or list, scroll to the bottom.
- Click on the **Account Closure** option.

Step 4: Select Account Type

- A pop-up will appear asking which account you wish to update.
- Select **Both** (to close both Trading and Demat) and click **Proceed**.

Step 5: Provide Feedback (Reason for Closure)

- Select the reason why you wish to close the account (e.g., Annual Maintenance Charges, Platform Issues, etc.).
- Click **Continue**.

Basic Profile Details
Mobile, Relationship, Email ID, Address

Annual Income Details
Update your Income by submitting documents

Nominee Details
Edit or update your nominee details

Bank Details
Modify or Link Your Primary Bank Details

Segment Activation
Active F&O, Commodities & Currency

Others
DDP, MTF, FATCA, ECN, ITORS, Digital CMR, Name & DSCB as Per PAN, Commodity Category, Default Bank, Default DP

Account Closure
Close your Account

Profile Settings > **Account Closure**
We are really sad seeing you leave. Help us improve Trade Mobi experience for you. Select the reason why you wish to close your account.

High Brokerage Charges Annual Maintenance Charges
 Platform Issues Customer Service
 Need better Analysis Tools Faced Losses in Trading
 Lack of Knowledge Others

Continue

Step 6: Review Account Balance and Holdings

- Check your **Trading Debit/Credit** and **DP Holdings**.
- **Note:** Your Net Debit/Credit must be **0** to proceed. If you have holdings (as shown in your screenshot with 113 units), you must sell or transfer them first.
- Click **Continue**.

Bank Details
Modify or Link Your Primary Bank Details

Segment Activation
Active F&O, Commodities & Currency

Others
DDP, MTF, FATCA, ECN, ITORS, Digital CMR, Name & DSCB as Per PAN, Commodity Category, Default Bank, Default DP

Account Closure
Close your Account

Account Details (Trading)

Client Code	<input type="text"/>
Trading Debit /Credit	0
Collateral Holding	0
Pool Holding	0
BTST	0
POA Status	No

Account Details (DP)

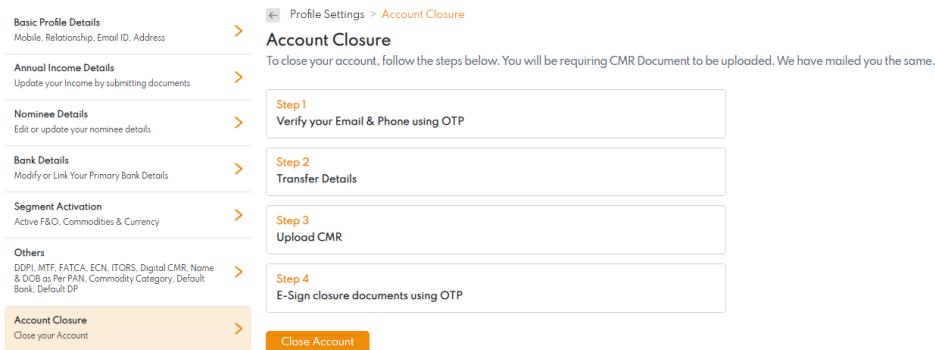
DP ID	<input type="text"/>
DP Holding	113
DP Debit /Credit	0
DP Scheme	
Dp Branch	N-JODHPUR
LAS/PMS Status	

Net Debit/Credit = 0

Continue

Activate Windows
Go to Settings to activate Windows.

Step 7: Steps description for closure process



Step 8: Verify Basic Details

- Review your Name, PAN, Phone, and Email ID.
- Click **Confirm** to move to the security verification.

← Profile Settings > Account Closure

Account Closure
Verify Basic Account Details

Name PAN Number

Phone Number Email ID

Confirm

Step 9: OTP Verification

- Enter the 4-digit OTP sent to your registered mobile/email.
- Click **Verify and Submit**.

Verify OTP
Enter 4-digit OTP send to your contact details

4 3 5 1

Resend OTP in 01:50

Verify and Submit

Step 9: Final Workflow & E-Sign

- The system will show a 3-step progress bar:
 1. Transfer Details (Incase of have holding)
 2. Upload CMR (Client Master Report)
 3. E-Sign documents