

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**.

ClassPlus™ User Login

USER NAME

PASSWORD

80

LOGIN

Forgot Password/Enable UserID?

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

Trading Code: [Field]

Personal Details :-

PAN number

DOB

Name of Account Holder

Account Status

Mobile

Relation with Mobile

Email

Relation with Email

KRA

CKYC

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 HDFC BANK

Permanent Address

Default Payout DP Id : 12010600006815432

Default Payout DP Id : 12010600006815432

Personal Details :-

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

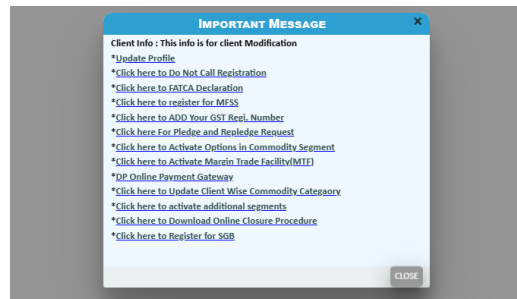
Permanent Address

Correspondence Address

Verify and Submit

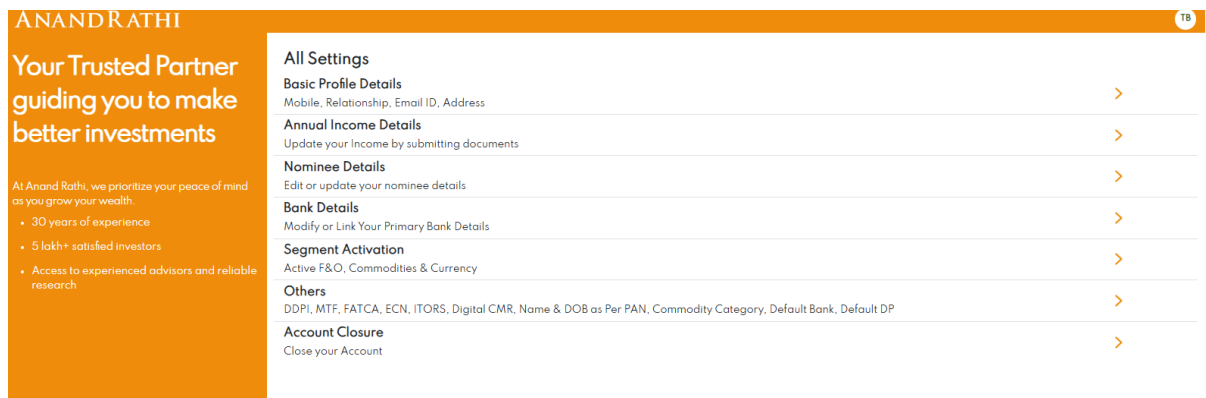
Step 2: Navigate to Profile Update

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



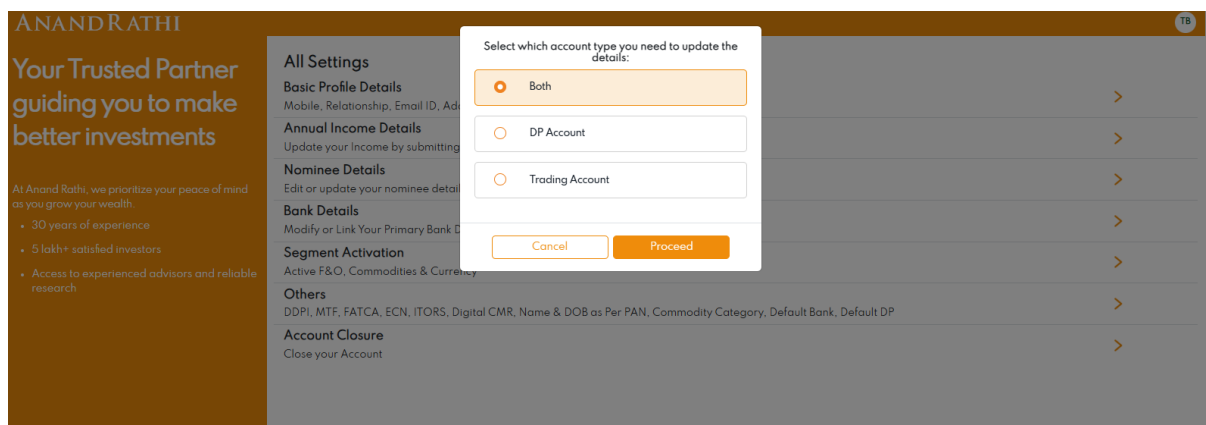
Step 3: Select Account Closure Menu

- 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
DDPI, MTF, FATCA, ECN, ITORS, Digital CMR, Name & DOB as Per PAN, Commodity Category, Default Bank, Default DP

Account Closure
Close your Account

Profile Settings > Account Closure

Account Closure

We are really sad seeing you leave. Help us improve Trade Mabi 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
DDPI, MTF, FATCA, ECN, ITORS, Digital CMR, Name & DOB as Per PAN, Commodity Category, Default Bank, Default DP

Account Closure
Close your Account

Account Details (Trading)

Client Code

Trading Debit /Credit

Collateral Holding

Pool Holding

BTST

POA Status

Account Details (DP)

DP ID

DP Holding

DP Debit /Credit

DP Scheme

Dp Branch

LAS/PMS Status

Net Debit/Credit = 0

Continue

0

0

0

0

No

113

0

N-JODHPUR

Activate Windows
Go to Settings to activate Windows.

Step 7: Steps description for closure process

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
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DDPI, MTF, FATCA, ECN, ITORS, Digital CMR, Name & DOB as Per PAN, Commodity Category, Default Bank, Default DP

Account Closure
Close your Account

Profile Settings > Account Closure

Account Closure
To close your account, follow the steps below. You will be requiring CMR Document to be uploaded. We have mailed you the same.

Step 1
Verify your Email & Phone using OTP

Step 2
Transfer Details

Step 3
Upload CMR

Step 4
E-Sign closure documents using OTP

Close Account

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:
 - Transfer Details (Incase of have holding)
 - Upload CMR (Client Master Report)
 - E-Sign documents