

### Instructions to fill eCAN with Transaction (Optional)

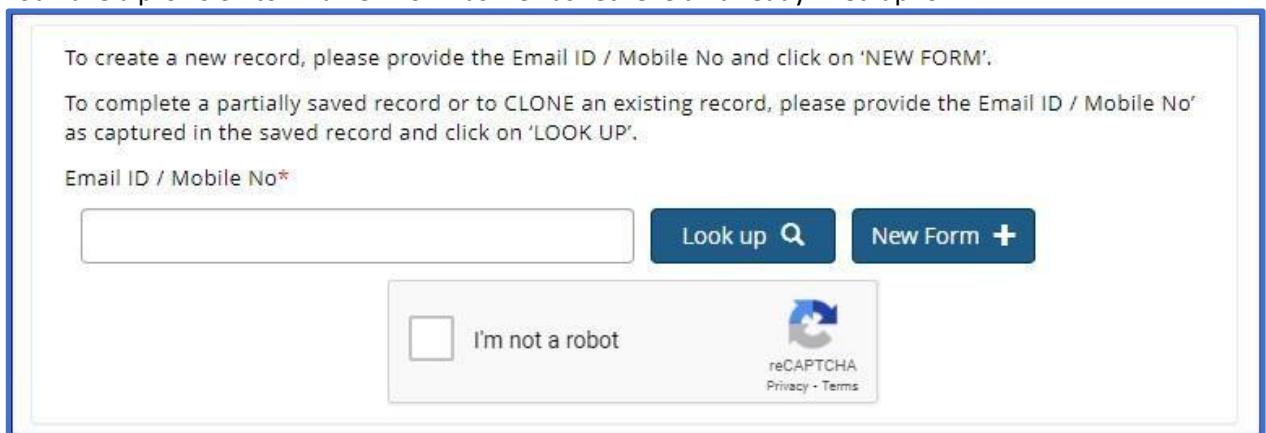
1. eCAN – An easy way to open a Common Account Number (CAN)

INDIVIDUAL INVESTORS can use this facility to open an eCAN (Common Account Number) by submitting the account information / details / document proof(s) ONLINE.

2. **INDIVIDUAL INVESTORS WHO are KYC** compliant through any of the KYC Registration Agencies (KRA) can register for eCAN, by submitting necessary data and uploading the required document proof(s) immediately **OR** through the link provided as part of the confirmation email from MFU and there is no need to submit any document physically/later. **INVESTOR(S) WHO ARE NON-KYC-KRA** compliant may choose to complete KYC via Video KYC options through some of the Mutual Funds website, the link(s) for which is provided post submission of eCAN data.

Investors are requested to please read the [Terms and Conditions](#) and related [FAQs on eCAN](#) before proceeding further.


3. You have a provision to fill a new form as well as retrieve an already filled up form.




The screenshot shows a web form with the following elements:

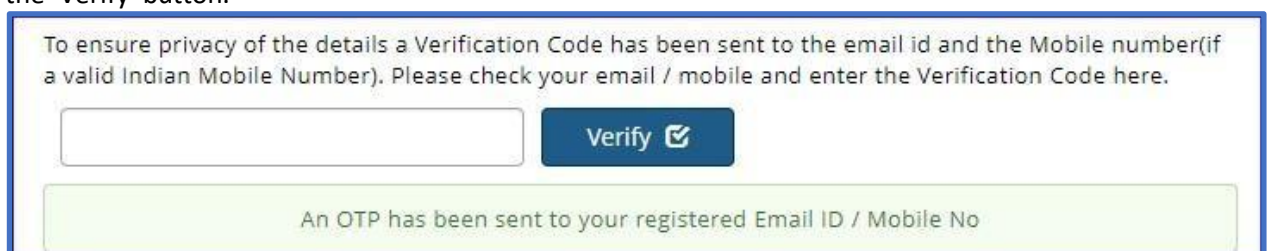
- Text: "To create a new record, please provide the Email ID / Mobile No and click on 'NEW FORM'."
- Text: "To complete a partially saved record or to CLONE an existing record, please provide the Email ID / Mobile No' as captured in the saved record and click on 'LOOK UP'."
- Text: "Email ID / Mobile No\*"
- Input field: A text box for entering the email ID or mobile number.
- Buttons: "Look up" with a magnifying glass icon and "New Form" with a plus sign icon.
- reCAPTCHA: A checkbox labeled "I'm not a robot" and the reCAPTCHA logo with "reCAPTCHA Privacy - Terms" text.

4. For both purposes, you should prove yourself to be a human user by clicking "I'm not a robot" check box upon which you may/shall be asked to identify specific images as a response to the question posed. Upon successful selection of the set of relevant images by you, the system will automatically put a TICK (✓) mark in the check box after which you can proceed further.

5. For filling a NEW FORM, you should click on the  button and proceed further.

6. If you wish to retrieve a form filled up earlier either to (a) make any changes / modifications; (OR) (b) CLONE the data for creation of an eCAN for a different combination; or (c) Check the status of eCAN Registration, please input the primary holders email as provided by you in the **earlier saved record** and click on the  button. Retrieve / Look up will not work for eCANs which have already been Approved.

A verification code will be sent to the email ID. Please input the verification code received and click the 'Verify' button.






The screenshot shows a verification screen with the following elements:

- Text: "To ensure privacy of the details a Verification Code has been sent to the email id and the Mobile number(if a valid Indian Mobile Number). Please check your email / mobile and enter the Verification Code here."
- Input field: A text box for entering the verification code.
- Button: "Verify" with a checkmark icon.
- Message: A green banner at the bottom stating "An OTP has been sent to your registered Email ID / Mobile No".

7. Upon inputting the verification code, the following screen will appear, displaying the records available already where the given email is captured in the CAN data.

CRF No	Primary Holder Name	PAN PEKRN	Holding Mode	Holders	CAN	Actions
						  
						  

8. Please click on  to make any changes / modifications to the data in the same record. Please click on  to CLONE the record and use it for creation of another eCAN combination. Please click on  to check if there are any validation errors on the data submitted by you and / or the current status of your eCAN Registration.

9. Procedure to fill up a NEW form:

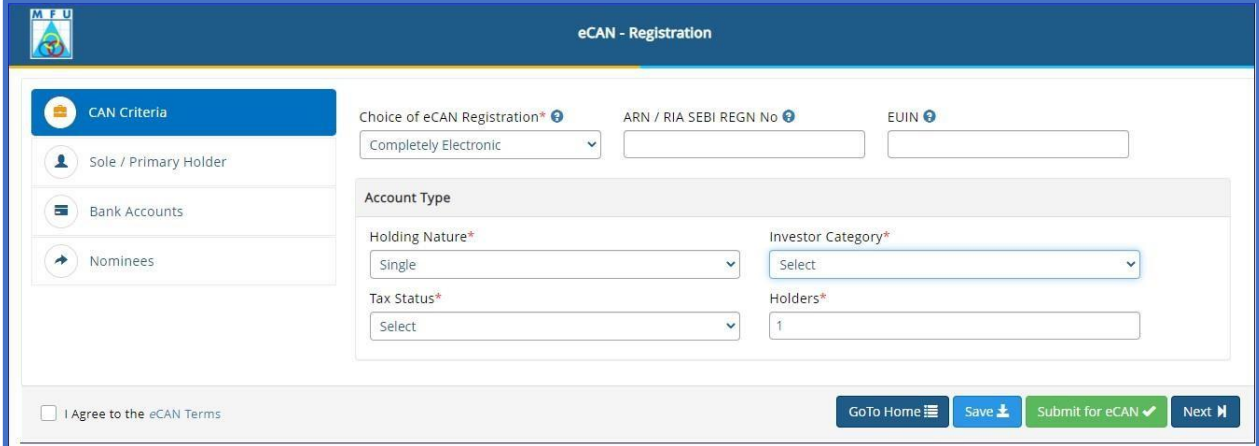
**THERE IS A PRE-DEFINED TIMELINE OF 15 MINUTES TO COMPLETE THE FILLING OF THE FORM. THE SESSION MAY GET TIMED-OUT IF YOU DO NOT COMPLETE THE FORM WITHIN THE TIMELINE. HENCE, TO AVOID LOSS OF ALREADY ENTERED DATA, WE REQUEST YOU TO KEEP SAVING THE FORM. THIS WILL HELP YOU TO RETRIEVE THE PARTIALLY SAVED FORM AND CONTINUE, IN CASE THE SESSION TIMES-OUT.**

Please choose your “Choice of eCAN registration” from the dropdown. Please click on the help (?) available adjacent to the dropdown or visit the [FAQs on eCAN](#) for more details on these choices.

Please mention the ARN / RIA code of the Distributor / Investment Advisor who recommended you for opening an eCAN with MFU. Else, leave this field blank.

Please mention the EUIN code of the employee of the Distributor in case you wish to record the details of the specific employee of the Distributor (ARN) who recommended you for opening an eCAN with MFU. Else, leave this field blank.

Please select the Holding Nature, Investor Category and Tax Status. If you choose ‘Single’ as the Holding Nature, the number of Holders will be limited to ‘1’. If you choose ‘Joint’ or ‘Anyone or Survivor’ as the Holding Nature, you must specify the number of holders (subject to a minimum of 2 and maximum of 3) you wish to add under the CAN. Accordingly, the system will enable specific Tabs for capturing the details of as many joint holders also.



Please provide the Primary Holder’s details like Name, Date of Birth, PAN (If PAN is not available PAN Exempt KYC Reference Number (PEKRN)), email and Mobile details, Additional KYC & FATCA details required under Foreign Tax Laws.

**Basic Details**

Name\*  Date of Birth\*  PAN / PEKRN\*

Res. (ISD-STD-Phone)    Mobile (ISD-Mobile)\*

Email\*

**Additional KYC Details**

Gross Annual Income\*\*   Networth (in Rs.)\*\*   As on date\*\*

Source of Wealth  Occupation\*  Political Exposure\*  KRA Address Type\*

Other  Other

**FATCA Details**

Tax Residency in a country other than India?\*

Place of Birth\*  Country of Birth\*  Country of Citizenship\*  Country of Nationality\*

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Please provide the above-mentioned details also for all the Joint holders (Second / Third) if you have chosen to add joint holders.

- CAN Criteria
- Sole / Primary Holder
- Second Holder**
- Third Holder
- Bank Accounts
- Nominees

**Basic Details**

Name\*  Date of Birth\*  PAN / PEKRN\*

Res. (ISD-STD-Phone)    Mobile (ISD-Mobile)\*

Email\*

**Additional KYC Details**

Gross Annual Income\*\*   Networth (in Rs.)\*\*   As on date\*\*

Source of Wealth  Occupation\*  Political Exposure\*  KRA Address Type\*

Other  Other

**FATCA Details**

Tax Residency in a country other than India?\*

Place of Birth\*  Country of Birth\*  Country of Citizenship\*  Country of Nationality\*

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- CAN Criteria
- Sole / Primary Holder
- Second Holder
- Third Holder
- Bank Accounts
- Nominees

#### Basic Details

<b>Name*</b>	<b>Date of Birth*</b>	<b>PAN / PEKRN*</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Res. (ISD-STD-Phone)</b>	<b>Mobile (ISD-Mobile)*</b>	<b>Email*</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Additional KYC Details

<b>Gross Annual Income**</b>	<b>Networth (in Rs.)**</b>	<b>As on date**</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Source of Wealth</b>	<b>Occupation*</b>	<b>Political Exposure*</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Other</b>	<b>Other</b>	
<input type="text"/>	<input type="text"/>	

#### FATCA Details

<b>Tax Residency in a country other than India?*</b>	<input type="text"/>
<b>Place of Birth*</b>	<b>Country of Birth*</b>
<input type="text"/>	<input type="text"/>
<b>Country of Citizenship*</b>	<b>Country of Nationality*</b>
<input type="text"/>	<input type="text"/>

I Agree to the eCAN Terms

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If the Sole / Primary applicant is a Minor, choose the Holding Nature as Single, Investor Category as Minor and relevant Tax Status.

In which case, the Holding Nature will by default be considered as Single and Holders will be limited to '1' and a separate Tab is enabled for Guardian (instead of Second / Third holder) to provide the Guardian details for the Sole / Primary minor applicant.

The screenshot displays the eCAN application form with the following sections:

- Navigation Menu:**
  - CAN Criteria
  - Sole / Primary Holder
  - Guardian Holder** (highlighted)
  - Bank Accounts
  - Nominees
- Basic Details:**
  - Name\* (text input)
  - Date of Birth\* (date picker)
  - PAN / PEKRN\* (text input)
  - Res. (ISD-STD-Phone) (text input with '91' dropdown)
  - Mobile (ISD-Mobile)\* (text input with '91' dropdown)
  - Email\* (text input)
  - Relationship with Minor\* (dropdown: Select)
  - Proof of Relationship\* (dropdown: Select)
- Additional KYC Details:**
  - Gross Annual Income\*\* (dropdown: Select)
  - Networth (in Rs.)\*\* (text input)
  - As on date\*\* (date picker)
  - Source of Wealth (dropdown: Select)
  - Occupation\* (dropdown: Select)
  - Political Exposure\* (dropdown: Select)
  - KRA Address Type\* (dropdown: Select)
  - Other (text input)
  - Other (text input)
- FATCA Details:**
  - Tax Residency in a country other than India?\* (dropdown: No - Not a Tax Resident in a Country other than India)
  - Place of Birth\* (text input)
  - Country of Birth\* (dropdown: Select)
  - Country of Citizenship\* (dropdown: Select)
  - Country of Nationality\* (dropdown: Select)
- Footer:**
  - I Agree to the eCAN Terms
  - GoTo Home
  - Prev
  - Save
  - Submit for eCAN
  - Next

You should specify the FATCA details for all the holders (First / Second / Third), including that of the Guardian in case the Sole / Primary applicant is a Minor.

If you are not tax resident in a country other than India, please select 'No' in the drop-down. However, you will be required to provide your Place of Birth, Country of Birth, Country of Citizenship and Country of Nationality

This close-up view of the FATCA Details section shows:

- Tax Residency in a country other than India?\* (dropdown menu selected to "No - Not a Tax Resident in a Country other than India")
- Place of Birth\* (text input field)
- Country of Birth\* (dropdown menu selected to "Select")
- Country of Citizenship\* (dropdown menu selected to "Select")
- Country of Nationality\* (dropdown menu selected to "Select")

If you are a tax resident in a country other than India, please select 'Yes' in the drop-down. In addition to your Place of Birth, Country of Birth, Country of Citizenship and Country of Nationality, you will also be required to provide the list of countries where you are tax resident along with the Tax Identification Number and Identification Type.

**FATCA Details**

Tax Residency in a country other than India?\* Yes - Tax Resident in a Country other than Ind

Place of Birth\*  Country of Birth\* Select Country of Citizenship\* Select Country of Nationality\* Select

Countries of Tax Residency\* Select Tax Identification Numbers\*  Tax Identification Types\* Select

Please mention the Bank Account details which you wish to get registered under the eCAN. You have provision to register up to 3 bank accounts under the eCAN. Ensure to provide all the details as requested in the screen below:

**Bank Accounts**

**Default Bank Account details**

Bank A/c No\*  Account Type\* Select Bank\*

MICR\*  IFSC\*  Bank Proof\* Select

**Second Bank Account**

Bank A/c No  Account Type Select Bank

MICR  IFSC  Bank Proof Select

**Third Bank Account**

Bank A/c No  Account Type Select Bank

MICR  IFSC  Bank Proof Select

I Agree to the eCAN Terms

[GoTo Home](#) [Prev](#) [Save](#) [Submit for eCAN](#) [Next](#)

If you DO NOT wish to nominate, you can do so by choosing 'No – I do not want to nominate' in the dropdown against the Nomination Option.

**Nominees**

**Nominee details**

Nomination Option\* No - I do not want to Nominate

I Agree to the eCAN Terms

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If you wish to nominate, you can do so by choosing 'Yes – I wish to nominate' in the dropdown against the Nomination Option. Up to 3 nominees can be registered in the eCAN with the total of all the percentage shares summing up to 100%. Please see the screen below:

Where a nominee is a minor (based on date of birth), the system will prompt you to provide the Guardian details of the Nominee.

10. Once the form is filled, tick the 'I Agree to the eCAN Terms' checkbox (you may choose to view the terms by clicking on 'eCAN Terms' hyperlink) and then click on

(1) 'Submit for eCAN' – if you wish to submit the data for generation of eCAN

OR

(2) 'Save' - if you wish to save the form and retrieve it again for modification/submission later.

Upon clicking 'Submit for eCAN' you will be provided with validation errors/warnings, if any and you may have to rectify them and submit again. If there are no validation errors/warnings, the data will be accepted for further process and you will be provided with a PROVISIONAL eCAN instantly as per below screen.

**eCAN Request Accepted**

eCAN allotted is: 20358BC003

[Click Here](#) To upload proofs.

Unless the eCAN is approved, transactions quoting this eCAN cannot be submitted. Once eCAN is approved, a confirmation SMS/email will be sent.

For approval of this eCAN, please complete the following actions as specified:

1. The document proof images **MUST be SELF ATTESTED** and uploaded within 2 days.
2. This "eCAN" may be changed to 'Partially Electronic eCAN' due to unavoidable reasons. If changed, you will receive a pre-filled eCAN application form through email giving reasons for the change. The form shall be printed, signed and submitted along with proof documents within 2 days to your Distributor/RIA or nearest MFU Point of Service (POS) or MFU Thane Office.
3. For more clarifications on eCAN, please go through the eCAN FAQs under the FAQ section.
4. All existing folios matching the following criteria will be mapped to this CAN on approval
  1. Investor Category (Individual, HUF, Corporate, etc)
  2. PAN of the holders
  3. Order of Holding (ABC, ACB, CBA, etc)
  4. Mode of Holding (Single, Anone or Survivor, Joint)
  5. Status (Resident Indian, NRI-NRE, NRI-NRO, etc)

Any change in any of the above parameters will require a new CAN to be opened.

[Click Here](#)

The proof documents can be uploaded immediately by clicking on [Click Here](#) or through the link provided in the email sent to the email ID registered under the eCAN. Investor(s) should upload the relevant document proof(s) as stated in the email, in the respective image formats. The eCAN will be approved and activated for further transactions, after necessary validations / verifications at the MFU office. MFU may reject the eCAN in case the information / details / proofs / images (including signatures) either submitted by you / sourced from the KRAs / is incorrect / incomplete.

11. For uploading documents

[Click Here](#) To upload proofs.

Click on

**CAN PROOF UPLOAD**

Please ensure that you upload all the required document proofs in one-go as you will not be permitted to upload any document images once the CAN data is VERIFIED at MFU.

CAN: 21044BC001

[+ Add files...](#)

Image Preview	Image Name	Image Size	Proof Type	Status	Options
<p><b>Note:</b> The allowed image file formats ( GIF, JPG   JPEG, PNG, BMP ). Recommended file size should not be more than 500 KB.</p> <ol style="list-style-type: none"> <li>1. The PAN proof MUST be SELF ATTESTED by respective PAN holder</li> <li>2. Bank document proof for each of the bank added :           <ol style="list-style-type: none"> <li>a. Bank statement must be latest (of the last 3 months) with Bank A/C type, MICR, IFSC Code &amp; Bank Account number (without masking) OR</li> <li>b. Cheque image should have CAN Primary holder/MINOR name printed on it along with above details OR</li> <li>c. Bank letter with all the above details</li> </ol> </li> <li>3. For MINORS birth certificate should have           <ol style="list-style-type: none"> <li>a. MINOR Name &amp; DOB along with Guardian Name printed on it OR</li> <li>b. Court Order for Appointed Guardian</li> </ol> </li> <li>4. Sole-Proprietor proof should have           <ol style="list-style-type: none"> <li>a. GST Certificate / Banker letter / Gumasta license where Sole-Proprietor Firm Name and PAN is appearing</li> </ol> </li> </ol>					

[Click here for Transact](#) OR [Close](#)

Click on Add files..., attach relevant proof; accordingly Select Proof Type and click on Upload

[+ Add files...](#)

Image Preview	Image Name	Image Size	Proof Type	Status	Options
	UAT.JPG	23.66 KB	Proof of Bank Account provided	Uploaded	<a href="#">Delete</a>

After uploading all the proofs click on If you wish to submit Transaction then click on

[Click here for Transact](#)

OR click on Close.

[Click here for Transact](#)

Upon clicking system will take you to transactions submission screen.

### Scheduled Purchase Transaction

**Basic Details**

CAN : 21044BC001      Name : JIGAR SHAH      CAN Status : Pending  
KYC Status : Approved      TAX Status : 01-RES.IND (Sole-Proprietor)

**ARN / Transaction Entity Details**

Direct :       RIA No : INA        
RIA Name :       [Validate](#)

**Transaction Details**

Fund (AMC) Name\* :       Folio Number\* :   
Scheme Name\* :       Dividend Option\* :   
#Scheme includes Plan and Option  
Amount\* :   
[+ Add Txn.](#)      [Reset](#)

**Payment Details**

Payment Type\* :       Source Account Number\* :       [View Bank Details](#)  
NEFT/RTGS Transfer done :       UTR Reference Number :   
Payment Date\* : 13-02-2021      Beneficiary A/C No :   
Amount to transfer : 0.0  
Please note : Payment (other than payment type 'PayEezz') should be made within 24 hours from the date of executing the transactions, else transactions will be liable to be rejected.

I accept the [Terms and Conditions](#)

[Submit](#)      [Reset](#)

At the time of eCAN creation if you have provided ARN with EUIN / RIA details same will be prepopulated in the transaction submission screen.

Under Transaction Details, Select

AMC Name

Folio number (will be always be **NEW ONLY**),

For Scheme Selection click on

Scheme Name\* :

#Scheme includes Plan and Option

New **Scheme Search** window will open.

**SCHEME SEARCH** ✕

Fund(AMC) Name :  Scheme Category :

Scheme Sub Category :  Plan Type :

Scheme Name :  RTA Scheme Code :

ISIN Code :

Input relevant word of the scheme name where you intend to invest for e.g. Equity, based on which system will display list of schemes available in MFU for transaction. If desired scheme is not available in the screen please click on NEXT button available in Right bottom corner.

**SCHEME SEARCH** ✕

Fund(AMC) Name :  Scheme Category :

Scheme Sub Category :  Plan Type :

Scheme Name :  RTA Scheme Code :

ISIN Code :

Scheme Short Name	Plan Type	Scheme Name	RTA Scheme Code	ISIN Code
Edelweiss ASEAN Equity Off-shore Fund	Direct	Edelweiss ASEAN Equity Off-shore Fund-Direct Plan Growth	ASD1G	INF843K01AW7
Edelweiss Emerging Markets Opportunities Equity Of	Direct	Edelweiss Emerging Markets Opportunities Equity Off-shore Fund-Direct Plan Growth	EMD1G	INF843K01I23
Edelweiss Equity Opportunities Fund	Direct	Edelweiss Equity Opportunities Fund-Direct Plan Dividend	EFD2R	INF843K01AN6
Edelweiss Equity Opportunities Fund	Direct	Edelweiss Equity Opportunities Fund-Direct Plan Dividend	EFD2D	INF843K01AM8
Edelweiss Equity Opportunities Fund	Direct	Edelweiss Equity Opportunities Fund-Direct Plan Growth	EFD1G	INF843K01AL0
Edelweiss Equity Savings Advantage Fund	Direct	Edelweiss Equity Savings Advantage Fund-Direct Plan Dividend	EID2R	INF843K01KF1
Edelweiss Equity Savings Advantage Fund	Direct	Edelweiss Equity Savings Advantage Fund-Direct Plan Dividend	EID2D	INF843K01KE4
Edelweiss Equity Savings Advantage Fund	Direct	Edelweiss Equity Savings Advantage Fund-Direct Plan Growth	EID1G	INF843K01KCB
Edelweiss Equity Top 100 Fund	Direct	Edelweiss Equity Top 100 Fund-Direct Plan Dividend Option	EGDDS	INF754K01BV6
Edelweiss Equity Top 100 Fund	Direct	Edelweiss Equity Top 100 Fund-Direct Plan Dividend Option	EGDDR	INF754K01BU8

Input Amount and click on Add Txn.

**Transaction Details**

Fund (AMC) Name\*:  Folio Number\*:


Scheme Name\*:   Dividend Option\*:

#Scheme includes Plan and Option

Amount\*:

Rupees One Lakh only

System will allow you to add upto 12 schemes in one Order. Keep on adding schemes one by one upto 12 schemes.

Scheme Name	Dividend Opt.	Amount	Options
DSP BlackRock Small and Mid Cap Fund - Direct Plan - Dividend Reinvest <a href="#">View Load Details</a>	Re-Invest	10000.00	 
Edelweiss Equity Opportunities Fund-Direct Plan Dividend <a href="#">View Load Details</a>	Re-Invest	100000.00	 
2- Schemes	Total	110000.00	

Total Order Amount : Rupees One Lakh Ten Thousand only

Please Note : You can add up to 12 schemes in one order. To view load details click hyperlink once transaction is added to grid


Select relevant Payment Type, Accept Terms and Conditions, Click on Submit.

Payment Details

Payment Type\*:

Source Account Number\*:   
[View Bank Details](#)

UTR Reference Number:

Payment Date\*:  

Beneficiary A/C No :\*

Amount to transfer :

Please note : Payment (other than payment type 'PayEezz') should be made within 24 hours from the date of executing the transactions, else transactions will be liable to be rejected.

Total Order Amount : Rupees One Lakh Ten Thousand only

I accept the Terms and Conditions

Upon submission system will show Order Preview screen, so that you can check order details once again before final submission.

### Scheduled Purchase Transaction Confirmation ✕

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**Basic Details**

CAN : 21044BC001      Name : JIGAR SHAH

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**ARN / Transaction Entity Details ✔**

Direct : Direct

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Scheme Name	Dividend Option	Amount	Status
DSP BlackRock Small and Mid Cap Fund - Direct Plan - Dividend Reinvest	Re-Invest	10000	✔
Edelweiss Equity Opportunities Fund-Direct Plan Dividend	Re-Invest	100000	✔
2 - Schemes		Total	110000.00

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**Payment Details ✔**

Payment: NEFT      Source A/C: STATE BANK OF      Beneficiary: 11321044BC001  
Type:      No: INDIA-\*\*\*\*\*1413      A/C No:  
Amount to: 110000.00  
transfer:

Close
Confirm

System will display Reference No. for your records.

### Scheduled Purchase Transaction Success

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Your Purchase Transaction with Reference No 1045741613231038H82W has been successfully scheduled.

OK

MFU will verify and approve eCAN registration based on data provided along with Image(s) uploaded.

Upon eCAN approval –

- a. you will receive an email confirming the same for Opening of Common Account Number (CAN).
- b. you will also receive Order Approval email for approving the order.
- c. Post order approval by all Holders transaction will be executed / accepted and processed further.
- d. Another email with payment details will be sent to you to make necessary payment in MFU Escrow account.
- e. Post receipt of funds ONLY Subscription transaction will be Sent to RTA for Unit Allotment.