

Instructions to fill Online CAN form

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

1. To fill a new form, please click the 'New Form' button as provided in the screen below:

CAN - FillEezz

Individual Investors may use this facility to fill the CAN Registration Form online and have the Form downloaded or emailed as a PDF

Please read the [instructions](#) and related guidelines in filling up the CAN Registration Form

Note:This utility is only to facilitate the filling of the CAN Form. CAN will be created based upon submission of the signed form with all the required details and documents. Please read the instructions contained in the CAN Registration Form and ensure that all the required data is filled in.

Look up a saved record using the primary holder's email id or Click on New Form to create a new record.

Primary Holder's Email

2. If you wish to retrieve a form filled up earlier either to make changes or to clone the data for creation of a new CAN, please input the primary holders email as provided by you and click on the 'Look Up' button.

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

CAN - FillEezz

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Look up a saved record using the primary holder's email id or Click on New Form to create a new record.

Primary Holder's Email

To ensure privacy of the details a Verification Code has been sent to the given email id. Please check your email and enter the Verification Code here.

Verification Code

3. Procedure to fill up the form:

The screenshot displays the 'Primary Details' section of the CAN Registration Form. The interface includes a sidebar with navigation options: Primary Details (selected), Other Details, Bank Accounts, Nominees, and DP Details. The main form area contains the following fields:

- ARN / RIA SEBI REGN No:
- EUIN:
- Primary Holder Details**
 - Name:
 - Date of Birth:
 - PAN:
 - PAN Exempt:
 - AADHAAR:
 - Res. (ISD-STD-Phone):
 - Mobile (ISD-Mobile):
 - Email:
- Account Type**
 - Tax Status:
 - Holding Nature:
 - Holders:

At the bottom of the form, there are four buttons: 'Prev', 'Save', 'Save As New', and 'Next'.

Please provide the Primary Holder's details like Name, Date of Birth, PAN (If PAN is not available PAN Exempt KYC Reference Number by checking the PAN exempt box), Aadhaar, Contact details etc.

Please provide the Tax Status and Holding Nature from the dropdown menu. If you choose Joint or Anyone or Survivor as the Holding Nature, you will have to specify the number of joint holders you

wish to add under the CAN. Accordingly, the system will request you to provide the details of the joint holders also.

Primary Details

Other Details

Second Holder

Third Holder

Bank Accounts

Nominees

DP Details

Primary Holder Details

Name: Date of Birth: PAN: PAN Exempt:

AADHAAR:

Res. (ISD-STD-Phone): Mobile (ISD-Mobile): Email:

Account Type

Tax Status: Holding Nature: Holders:

Prev Save Save As New Next

Mention your Address, Additional KYC details and Details required under Foreign Tax Laws (as may be applicable to you) in the Other Details section as provided in the below screen:

Primary Details

Other Details

Bank Accounts

Nominees

DP Details

Address details

Address1: Address2: Address3:

City: PIN: State:

Additional KYC Details

Gross Annual Income: Networth: As on date: Source of Wealth:

Occupation: Political Exposure: KRA Address Type:

FATCA Details

Tax Residency in a country other than India?:

Prev Save Save As New Next

Please mention the Bank Account details which you wish to get registered under the CAN. You have provision to register up to 5 bank accounts under the CAN. Ensure to provide all the details as requested in the screen below:

Primary Details

Other Details

Bank Accounts

Nominees

DP Details

Default Bank Account details

Bank A/c No: Account Type: Bank: Branch:

City: MICR: IFSC: Bank Proof:

Second Bank Account

Third Bank Account

Fourth Bank Account

Fifth Bank Account

Prev Save Save As New Next

If you wish to nominate, you can do so by choosing 'Yes – I wish to nominate' in the dropdown against the Nomination Option. You also have an option to choose your intention not to nominate by choosing 'No – I Do not wish to nominate' in the dropdown. Up to 3 nominees can be registered in the CAN with the total of all the percentages summing up to 100%. Please see the screen below:

You can also register your Depository Account details under the CAN, which will help you to request us to credit your units to the Depository Account every time you make an investment.

Once the form is filled, click on (1) 'Save' - if you wish to save the form and retrieve it again (2) Save as New – if you have retrieved an earlier form and have made modifications and wish to save the details as another form (3) Finish & Submit – if you are through with the filling of the form and wish to go ahead and print the same.

Upon Finish & Submit, you will be provided with a confirmation of successful generation of the CAN Registration Form with details of Missing Data, Inconsistent Data, the documents to be submitted by you and an option whether to email you the form or you wish to print the same.

Your CAN Registration Form has been Generated successfully.

Missing Data: The following data is missing, Ensure that you fill up these details before physical submission:

- Missing or Invalid Additional KYC details of the Primary Holder.
- Missing or Invalid Second Holder's Additional KYC details.

Inconsistent Data: The following were certain data inconsistencies that have been addressed.

- None

Submit the signed copy of the CAN Registration Form at a nearest MFU Point of Service or send it to MFU Office by courier along with the following documents for processing:

- Self attested copy of Primary holder's PAN / PEKRN
- Self attested copy of the Second Holder's PAN / PEKRN
- Cancelled Cheque or Self attested copy of Cancelled Cheque pertaining to Bank Account *****52165 with HDFC BANK LTD
- Cancelled Cheque or Self attested copy of Cancelled Cheque pertaining to Bank Account *****07210 with ICICI BANK LTD
- Cancelled Cheque or Self attested copy of Cancelled Cheque pertaining to Bank Account *****47491 with STATE BANK OF INDIA
- Necessary documents pertaining to FATCA / CRS as may be required. Refer [Instructions](#) for detail.

KYC Compliance

KYC compliance is compulsory for CAN creation. If you are not already KYC compliant, please submit [KYC Registration Form](#) along with necessary documents and MFU will facilitate KYC registration along with creation of CAN.

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