Instructions to fill eCAN form

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. Please click here to know the qualification criteria for opening an eCAN. Investors are requested to please read the Instructions to fill eCAN, Terms and Conditions and related FAQs on eCAN before proceeding further.

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

![Form](image)

3. 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.

4. For filling a NEW FORM, you should click on the **New Form** button and proceed further.

5. 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 **Look up** button.

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

![Verification Code](image)

6. 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. Please click on ![Edit](image) icon to make any changes / modifications to the data in the same record. Please click on ![Clone](image) icon to CLONE the record and use it for creation of another eCAN combination. Please click on ![Check](image) icon to check if there are any validation errors on the data submitted by you and / or the current status of your eCAN Registration.

![Record Selection](image)
7. 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 to open a CAN 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 to open a CAN with MFU. Else, leave this field blank.

Please select the CAN criteria from the drop-down i.e. Tax Status and Holding Nature. 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) by checking the PAN exempt box), Aadhar, contact details, Additional KYC & FATCA details required under Foreign Tax Laws (as may be applicable to you).
Please provide the above-mentioned details also for all the Joint holders (Second / Third), if you have chosen to add joint holders.
If the Sole / Primary applicant is a Minor, you should choose the relevant MINOR Tax Status in the CAN criteria section.

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.

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.

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

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.

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 CAN 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.

8. Once the form is filled, click on

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

(2) ‘Submit for eCAN’ – if you wish to submit the data for generation of eCAN

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 CAN instantly.

9. If your “Choice of eCAN Registration” is ‘Completely Electronic”, you will get the following message:

**CAN Request Accepted**

eCAN Number generated is:

17304QZA15

![click here button](click here to upload the proof documents.)

 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 initiate the following action as specified:

1. The link for uploading the document proofs is available in the email sent to the email ID of Sole / Primary holder / Guardian. The list of documents is mentioned in the email.

2. The document proof images MUST be uploaded within 7 days.

3. This “eCAN” may be changed to “Partially Electronic eCAN” due to unavoidable reasons. If changed, a pre-filled eCAN application form will be emailed giving reasons for the change. The form shall be printed, signed and submitted along with proof documents within 7 days to an Intermediary (Distributor/RIA) or nearest MFU Point of Service (POS).

4. To register SIPs online and to make auto-debit payments for purchase transactions, you will have to register a PayEzz (One-Time) Mandate.

5. For registering PayEzz (One-Time) Mandate under this eCAN, the PayEzz mandate form should be duly filled, signed and submitted to an Intermediary or nearest MFU POS, either along with eCAN application form or after approval of eCAN.

6. For more clarifications on eCAN, please go through the eCAN FAQs under the FAQ section.

The proof documents can be uploaded immediately by clicking the ![click here button](click here) button available in the above screen or through the link provided in the email sent to the email ID registered under the CAN. You should upload the relevant document proof(s) as stated in the email, in the
respective image formats. The CAN will be approved and activated for further transactions, after necessary validations / verifications at the MFU office. In case the information / details / proofs / images (including signatures) either submitted by you / sourced by MFU from the KRAs / CERSAI / RTAs does not satisfy the requirements of “Completely Electronic” eCAN, the record will be converted to “Partially Electronic” eCAN and an email will be sent to the registered email ID of the Sole / Primary holder along with a pre-filled “eCAN Registration Form”, which needs to be printed and duly signed by all the holder(s) / guardian and submitted along with the necessary documentary proof(s), to a MFU authorized entity or a MFU Point of Service (POS) for further processing. The CAN will be approved and activated for further transactions, upon submission of the physical documents as stated.

10. If your “Choice of eCAN Registration” is ‘Partially Electronic’, you will get the following message:

![CAN Request Accepted]

The CAN data submitted / re-submitted has been accepted and the PROVISIONAL eCAN (Common Account Number) allotted to you is: 17304QZA20

For successful approval/activation of this PROVISIONAL eCAN, we request you to go through the below mentioned points and initiate action as specified:

1. A pre-filled eCAN application form will be emailed to the email ID of the Sole / Primary holder / Guardian along with the list of documents proof(s) to be submitted.
2. The form has to be physically submitted along with proof documents within 7 days from the date of receipt of the email containing the attachment, to an intermediary (Distributor/PMU) or a nearest MFU Point of Service (POS), else the ‘PROVISIONAL’ eCAN will be automatically cancelled by the System and data has to be resubmitted once again for a fresh eCAN.
3. In case PayRez (One-Time) Mandate is required to be registered under the eCAN, a duly filled and signed PayRez mandate form has to be submitted to an intermediary (Distributor/PMU) or a nearest MFU Point of Service (POS), either along with the eCAN application form or after the activation/approval of eCAN.
4. Please do not submit any physical transactions quoting this PROVISIONAL eCAN unless a confirmation is received by SMS/email about its activation/approval by MFU.
5. For more clarifications on eCAN, you should go through the eCAN FAQs under the FAQ section.

You should print the “eCAN Registration Form” and submit the same, duly signed by all the holder(s) / guardian, along with the necessary documentary proof(s), to a MFU authorized entity or a MFU Point of Service (POS) for further processing. The CAN will be approved and activated for further transactions, upon submission of the physical documents as stated.