

CLIENT ONBOARDING

Introduction Meeting

- How Vista Initiative Work
- What our revenue Model
- What are our Product
- Investment Objective
- Time Horizon

Details Needed

- Name
- Aadhar Number (Soft copy)
- Pan Number. (Soft copy)
- Annual Income
- Dob
- Place of Birth
- Father's name
- Mother's name
- Account Number & IFCI code
- Cancel cheque photo or 6 month bank statement.
- Email Id
- Ph No
- Address
- Nominee Name
- Nominee Dob
- Nominee Relation

Validated

Not Validated

Kyc Status

Complete Kyc Online / Offline

NSE/BSE Profile Creation
NACH Approval
Client Profiling

Client Meeting

- Investment Objective
- Goal Creation
- Risk Profiler
- Selection of Fund
- Goal Mapping with Fund

Transaction Initiated
NSE /BSE MF

Client Onboarding
on Redvison App

- User Id / Password Creation
- Goal Mapping
- Folio checkup

Portfolio Review after
Half Yearly / Yearly