

**FINANCIAL & OCCUPATIONAL DETAILS MODIFICATION FORM**

To,

Date: \_\_\_\_/\_\_\_\_/ 20

Karuna Financial Services Pvt. Ltd.  
Compliance Department  
207 C.R.Avenue, "Meridian Plaza-I"  
3<sup>rd</sup> Floor, Kolkata – 700 006

Dear Sir/Madam,

I/We request you to update below mentioned Financial & Occupational Details in my/our Account with Karuna Financial Services Pvt. Ltd.,

Trading ID: \_\_\_\_\_

(Please tick whichever is applicable)

Additional Financial Details	
Financial Status (Annual Income)	< Rs. 1 Lakh Rs. 1 – 5 Lakh Rs. 5 – 10 Lakh Rs. 10 – 25 Lakh > Rs.25 Lakh
Occupation	Service Professional Self employed Student Housewife Retired Others (Specify) _____
If Service is selected, then please provide the nature of service undertaken: <b>Central Govt. State Govt.Public/Private Sector NGOStatutory Body</b> <b>Others (Specify) _____</b>	
If Business is selected, then please provide the nature of business undertaken Nature of Business(Products/services provided): _____ _____	

Enclosed are the valid financial proof(s) in support of the financial status declared above.

Name \_\_\_\_\_

Signature \_\_\_\_\_

**List of Valid Income Proof(s)**

1. Copy of ITR Acknowledgement (For last financial year)
2. Copy of Annual Accounts (last financial year for individuals, last two financial years for non individuals)
3. Copy of Form 16 in case of salary income (for last financial year)
4. Net worth certificate (latest one or at the end of last financial year)
5. Salary Slip (for one month in current financial year)
6. Bank account statement (for last 6 months)
7. Copy of demat account Holding statement (for the last/current financial year)
8. Any other relevant documents substantiating ownership of assets.

Please note that you can call us on (033) 30910815 on the 5th working day from the submission of the documents (i.e. if you have submitted the documents on Monday either in the branch or directly to the H.O. then call us on Friday after 2:30 p.m.) to check the status.