**Step by Step process to Open an Account with Stock Broker**

**Step 1: Choose a Stock Broker**

* Research brokers based on:
  + Brokerage charges
  + Account opening fees
  + Platform/app interface
  + Customer support
  + Investment options (stocks, mutual funds, F&O, etc.)
* Examples:
  + **India**: Zerodha, Upstox, Angel One, Groww

**Step 2: Visit the Broker’s Website or App**

* Go to the Broker’s Office or do visit official website or download the mobile app.
* Click on **“Open Account”**, **“Sign Up”**, or **“Create New Account”**.

**Step 3: Fill the Online Application Form**

**Provide:**

* **Personal Information**
  + Full name
  + Date of birth
  + Email ID and mobile number
  + PAN card (India) / SSN (US) / National ID
* **Bank Details**
  + Account number
  + IFSC/SWIFT code
* **Financial Details**
  + Income range
  + Occupation
  + Trading experience (if applicable)

**Step 4: Upload Required Documents**

**Upload scanned or photographed copies of:**

* **Identity Proof** (PAN, passport, Aadhaar, etc.)
* **Address Proof** (Aadhaar, utility bill, bank statement)
* **Bank Proof** (cancelled cheque, bank statement)
* **Signature & Photograph** (as per broker guidelines)

**Step 5: Complete e-KYC and In-Person Verification (IPV)**

* Many brokers offer **video KYC**.
  + You may need to record a video or join a live video call.
  + Show your ID and read out a code for verification.
* If offline, you may have to visit a branch or schedule a courier pickup.

**Step 6: Wait for Verification and Approval**

* Broker verifies your application and documents.
* Approval usually takes **1 to 3 working days**.
* You will receive:
  + Client ID / Trading ID
  + Login credentials by email/SMS

**Step 7: Login and Set Up Account**

* Login to the broker’s platform (website or app)
* Set your password and security questions
* Enable **2FA (two-factor authentication)**

**Step 8: Link Your Bank Account & Add Funds**

* Link your bank account for fund transfers
* Use NEFT, UPI, or net banking to deposit funds into your trading account

**Step 9: Start Trading or Investing**

* Access your **trading terminal**, **mobile app**, or **dashboard**
* Place your first order: buy/sell stocks, mutual funds, or other securities