

MF Client Onboarding Kit

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a mutual fund client onboarding kit — the onboarding steps (KYC, risk profiling, goal discussion, account setup, first investment), the documents to collect, and the disclosures to make (distributor status, no assured returns). Use this to onboard investors smoothly and compliantly. For selecting suitable funds afterwards use the MF Recommendation Framework.

Purpose of this tool & output

Onboard investors smoothly and compliantly

How the output is used

Use the kit to onboard investors smoothly and compliantly with KYC, risk profiling and documentation.

Important cautions

AI-generated kit; follow SEBI and AMFI onboarding and disclosure norms.

Companion documents

- Mutual Fund Distributor Setup
- MF Recommendation Framework
- Portfolio Review Report
- AMFI / SEBI Distributor Compliance
- Commission & Brokerage Tracker
- Fund Comparison Helper

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.