

InvestMentor - Online Account Closing Guide

Step 1: Login to client portal (<https://investmentoronline.com/portal/login>)

1. Enter Trading Code
2. Enter Password
3. Press Login

The image shows a screenshot of the InvestMentor Portal Login page. The page features the InvestMentor logo at the top, followed by the tagline "Invest Today For Your Tomorrow" and the title "Portal Login". Below the title, there are three input fields: "User ID / Trading Code" with a placeholder "Enter User ID", "Password" with a placeholder "Enter Password", and a green "Login" button. Below the "Login" button are two links: "First time user? Register now" and "Forgot password?". Three blue arrows with numbers 1, 2, and 3 point to the input fields and the "Login" button respectively, corresponding to the steps listed in the text above.

InvestMentor
Invest Today For Your Tomorrow

Portal Login

User ID / Trading Code

1 → Enter User ID

Password

2 → Enter Password

3 → Login

First time user? Register now

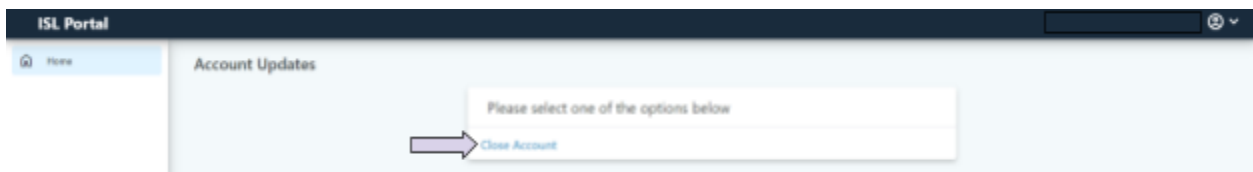
Forgot password?

Step 2: Select update settings under dropdown

1. Press the dropdown on the top right hand corner
2. Select "Update Settings"

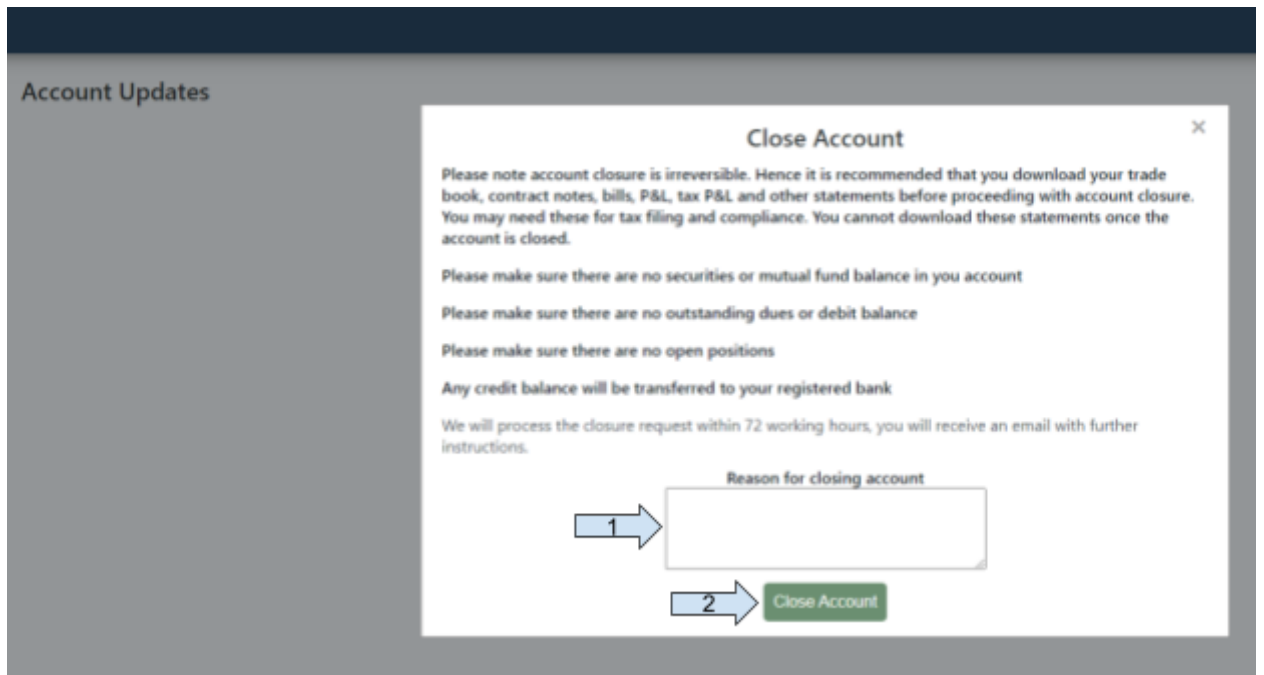


Step 3: Select Close Account



Step 4: Close Account Confirmation

1. Please read through the information and provide a reason for closing account for your records
2. Press Close Account



The screenshot shows a web interface with a dark blue header and a grey sidebar on the left labeled "Account Updates". A white modal dialog box titled "Close Account" is centered on the screen. The dialog contains the following text:

Please note account closure is irreversible. Hence it is recommended that you download your trade book, contract notes, bills, P&L, tax P&L and other statements before proceeding with account closure. You may need these for tax filing and compliance. You cannot download these statements once the account is closed.

Please make sure there are no securities or mutual fund balance in you account

Please make sure there are no outstanding dues or debit balance

Please make sure there are no open positions

Any credit balance will be transferred to your registered bank

We will process the closure request within 72 working hours, you will receive an email with further instructions.

Below the text is a text input field labeled "Reason for closing account". A blue arrow with the number "1" points to this field. Below the input field is a green button labeled "Close Account". A blue arrow with the number "2" points to this button.

Step 5: Please allow 72 hours for our time to verify your request and we will be in touch with you with additional requirements