What documents do I need to open an account?

Opening & Managing Account · https://windsorbrokers-chn.com/knowledge-base/opening-managing-account/what-documents-do-i-need-to-open-an-account/

In order to open an account with Windsor Brokers, you need to provide the following documentation:

Proof of Identity (POI): This can be a valid passport or national ID card that shows your full name, date of birth, and nationality. Acceptable POI documents may vary depending on your country of residence. Please follow the list provided on your WB Portal under “Upload Documents” for more information

To upload your POI document, you can follow the below steps: 1. Log in to your WB Portal from your PC or phone. 2. Click on “More (...)" and then select "Upload Documents". 3. Click on “Upload” next to the "Proof of Identity" option and proceed to upload a clear and valid copy of your identity document’s front and back side. 4. Once you are done, click on “Submit Proof of Identification”

Proof of Residency (POR): This can be a recent utility bill or bank statement that shows your full name and address, and is dated within the last six months. Acceptable POR documents may vary depending on your country of residence. Please follow the list provided on your WB Portal under “Upload Documents” for more information

To upload your POR document, you can follow the below steps: 1. Log in to your WB Portal from your PC or phone. 2. Click on “More (...)" and then select "Upload Documents". 3. Click on “Upload” next to the "Proof of Address" option and proceed to upload a clear and valid copy of your identity document’s front and back side. 4. Once you are done, click on “Submit Proof of Identification”