**ASSET SUMMARY**

**Full Name of Sponsors**

|  |  |  |
| --- | --- | --- |
| **Sr. No** | **Particulars** | **Amount**  **(Rs.)** |
| **IMMOVABLE ASSETS** | | |
| **1.** | **Residential House (**city, state) | market value |
| **2.** | **Agricultural Plot (**city, state) | market value |
| **3.** | **Commercial Office, Factory** (city, state) | market value |
| **4.** | **Godown, etc** (city, state) | market value |
|  | **IMMOVABLE TOTAL** |  |
| **MOVABLE ASSESTS** | | |
| **1.** | **SAVINGS BANK ACCOUNT** |  |
|  | Please list all the Bank Accounts that the family holds in various National, Private, Co-operative banks along with existing balance information. |  |
|  |
|  |
|  | **Sub Total** |  |
| **2.** | **FIXED DEPOSITS (FD)** |  |
|  | Please list all the Bank Accounts that the family holds in various National, Private, Co-operative banks along with existing balance information. |  |
|  |
|  |
|  | **Sub Total** |  |
| **3.** | **CURRENT ACCOUNT (If applicable)** |  |
|  | (Please mention name of Bank & average account balance hold) |  |
|  | **Sub Total** |  |
| **4.** | **SAVINGS AND INVESTMENTS** |  |
|  | PF / PPF Balance |  |
|  | LIC Policy (Surrender Value) |  |
|  | Post Office Deposit, NSC, KVP, IVP, RBI Bonds |  |
|  | Shares and Mutual Funds (market value) |  |
|  | **Sub Total** |  |
| **5.** | **INVESTMENT IN BUSINESS** (as per capital A/C copy – if applicable ) |  |
|  | **Sub Total** |  |
| **6.** | **JEWELRY & ORNAMENTS (approx value)** |  |
|  | **Sub Total** |  |
|  | **MOVABLE TOTAL** |  |

**Note:**

1. This information helps in assessing the financial documentation required for Visa.
2. Sponsors should ideally be Father, Mother or Grand Parents. This is a consolidated Asset Summary of Assets of all Sponsors.

**FUNDS Vs. EXPENSE**

**Sponsors Name**

|  |  |  |
| --- | --- | --- |
| **SOURCE OF FUNDS** | **INR** | **USD** |
| Savings Account | Existing Balance |  |
| Fixed Account | Existing Balance |  |
| Annual Salary |  |  |
| Business Income |  |  |
| Rental Income |  |  |
| Interest Income |  |  |
| Dividend Income |  |  |
| Non Taxed Income |  |  |
| Scholarship |  |  |
| PF/PPF/LIC Loan Available |  |  |
| **(A) TOTAL FUNDS** |  |  |
|  |  |  |
| **EXPENSE** | **INR** | **USD** |
| Tuition |  |  |
| Living Expense |  |  |
| Books &Supplies |  |  |
| Insurance |  |  |
| Others, if any |  |  |
| **(B) TOTAL EXPENSE** |  |  |
|  |  |  |
| **SURPLUS WITH FAMILY (A MINUS B)** |  |  |

**Note:**

* For the items listed under (A), include only those items that are applicable to your sponsor and omit the rest. Only mention values disclosed in Income Tax returns.
* Values for items listed under (B) would be mentioned in the I-20 of chosen university.

**INCOME SUMMARY**

**INCOME OF THE SPONSORS**

|  |  |  |  |
| --- | --- | --- | --- |
| **INCOME SOURCE** | **Father (INR)** | **Mother (INR)** | **Other (INR)** |
| Salary |  |  |  |
| Business |  |  |  |
| Pension |  |  |  |
| Rental |  |  |  |
| Interest |  |  |  |
| Dividend |  |  |  |
| Other Sources - Non Taxable |  |  |  |
| **TOTAL INCOME (INR)** |  |  |  |
| **TOTAL INCOME (USD) Converted @ Rs. 45 / USD** |  |  |  |

**Note:**

1. Please mention Only those income sources which are declared when filing Income Tax Returns. Do not mention undisclosed incomes here.
2. Please mention all incomes from all sources (even if exempt from Tax).
3. Make a separate note for any undisclosed income or any incomes not filed in Income Tax due to exemption (for e.g. Agriculture Income).
4. Sponsors should ideally be Father, Mother or Grand Parents.

**CERTIFICATE OF INCOME**

This is to certify that the following income was earned during the Accounting Year\_\_\_\_\_\_\_, either singly or jointly by Mr./Mrs. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Self) Resident of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**STATEMENT SHOWING INCOME OF LAST THREE YEARS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Assessment Year** | **Gross Income** | **Tax Deduction** | **Taxable Income** | **Tax Paid** | **Refund** |
|  |  |  |  |  |  |
| 2009-2010 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | If Applicable |
| 2008-2009 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | If Applicable |
| 2007-2008 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | As mentioned on Form 16 | If Applicable |

**Note:**

* To be prepared by Self or Chartered Accountant
* To be prepared for each sponsor who is filing tax returns
* To be submitted during Visa Interview along with supporting documents [Form 16].

**ORIGINAL DOCUMENTS TO BE CARRIED**

**DURING THE VISA INTERVIEW.**

1. **Academic Documents**
2. I-20 of the chosen University (and other University)
3. Copy of SEVIS Receipt
4. Passport size Photos
5. Transcripts of School and College
6. Degree Certificate (Provisional or Original)
7. Resumé
8. Recommendation Letters
9. TOEFL/IELTS Official Score Sheet
10. GMAT/GRE/SAT Score Sheet- if the test is taken
11. **Financial Documents**
12. Income Tax Returns of last 3 years [Form 16].
13. Bank Statement of Savings and Fixed Accounts
14. Fixed Deposit Receipts
15. Passbooks of Savings and Current Account OR Printout of Statement of Accounts
16. Papers of Other Investments (RBI Bonds, KVP, LIC, PPF, PF, IVP, Mutual Funds etc.)
17. PF/PPF (Withdrawable or Loan Available Statements and investment document)
18. LIC (Withdrawable or Loan Available Statements and investment document)
19. DMAT Statements of Mutual Funds
20. Property Valuation Reports (by Government Certified Real Estate Valuator)
21. Jewelry Valuation Reports (by a Jeweler certified).
22. **Financial Formats**
23. Asset Summary
24. Certificate of Income
25. Funds Vs Expense Statement
26. Income of the Sponsors Statement

1. **Other Documents (if applicable)**
2. Brochures of Company (in case of Business)
3. Family Photos (A pleasant photo with all the members of the family)
4. Office Factory Photos/ Catalogs/ Visiting Cards etc of parents
5. Parents Business Cards
6. Self Visiting Card & Appointment Letter – if available