

Financial Consulting Checklist

Introduction

This checklist provides the required documents for Financial Consulting services in India to support strategic financial planning and advice. For personalized assistance, contact our experts.

1 Required Documents

- **Financial Statements:** Balance sheets, profit and loss statements, or cash flow statements.
- **Bank Statements:** Recent statements for all business accounts.
- **Business Plan:** Detailed plan outlining business goals and strategies.
- **Tax Returns:** Previous income tax or GST returns for compliance review.
- **Investment Details:** Records of investments like mutual funds or fixed deposits.

Notes

- Documents may vary based on the scope of consulting (e.g., investment vs. cash flow focus).
- Organize documents by financial year for clarity.
- For more information, visit [ClearTax Business Services](#).