

CA / CS Firm Setup Guide

Consulting & Professional Services

Document type: Plan / SOP / strategy / guide · Generated 15 Oct 2026

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

Get a setup guide for a CA, CS or CMA professional practice — registration and Certificate of Practice, firm name and structure, a services menu, systems, first clients, and the institute norms on practice and advertising. Follow your institute regulations on practice and solicitation. Fill in your details below.

Purpose of this tool & output

Set up and grow a professional practice

How the output is used

Use the guide to set up and grow a professional (CA/CS) practice within institute rules.

Important cautions

AI-generated guide; follow your institute regulations on practice and solicitation.

Companion documents

- Engagement Letter Builder
- Professional Services Catalogue
- Client Compliance Calendar Service
- Client Data Request Checklist
- Professional Fee Quotation
- Professional Conduct & Ethics Guide

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.