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Client Data Request Checklist

Consulting & Professional Services

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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 client data and document request checklist so you collect what you need first time — documents grouped by service (income tax, GST, audit, ROC), a secure collection process, and privacy handling per DPDPA and confidentiality. Fill in your details below.

Purpose of this tool & output

Collect what you need, first time

How the output is used

Use the checklist to collect what you need from a client the first time, cutting back-and-forth.

Important cautions

AI-generated checklist; adapt to the specific engagement.

Companion documents

- CA / CS Firm Setup Guide
- Engagement Letter Builder
- Professional Services Catalogue
- Client Compliance Calendar Service
- 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.