

ACCOUNTING & BOOK KEEPING

Fractional CFO Services

Document Checklist for Accounting & Book Keeping

Professional assistance for Fractional CFO Services, covering eligibility review, document checklist, application preparation, filing coordination and follow-up support.

Documents Required

- Business registration/incorporation proof
- PAN card and GST registration of the business
- Existing financial statements and bookkeeping records
- Bank account statements/access details for financial review
- Details of existing accounting software/systems used
- Current financial reporting requirements (investors, board, lenders)
- Organisation chart and details of existing finance team, if any
- Specific areas/hours of engagement required (part-time CFO scope)

Note: The above list indicates commonly required documents. Additional documents may be requested depending on the specific scope of engagement. Expert Registration confirms the exact requirement after a brief consultation.