



# DATA GATHERING SHEET-POWER OF ATTORNEY

Create a Financial Power of Attorney to give access to your Assets in  
case you become Incapacitated

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Financial Power of  
Attorney

## **DATA REQUIREMENT FOR POWER OF ATTORNEY:**

### **1. Your Full Name (Same as on your ID Proofs)**

First Name

Middle Name

Last Name

### **Date of Birth**

DD	MM	YYYY
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### **Gender**

M	F
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### **Pan Card / Aadhar Card / Passport number**

### **Occupation**

### **Nationality**

☐ Indian

☐ Other

### **2. Type of Power of Attorney (Choose Any One)**

General Power of Attorney (Select this for Incapacitation)

☐

Special Power of Attorney (Select this Option for a Specific Task)

☐

### **3. Details of Assets & Liabilities (only in case of General Power of Attorney) (Refer Annexure)**

### **4. Purpose of granting Power of Attorney (tick one or more items – Only in case of Special Power of Attorney)**

a. To transact business

☐

b. To acquire or sell or transfer or deal with articles, goods movable or immovable properties

☐

c. To handle legal proceedings

☐

- d. Execution and registration of documents
- e. To file declarations and/or appear before authorities
- f. To open, operate, continue or close any Bank account
- g. Others \_\_\_\_\_

☐
☐
☐

## 5. PERSONAL INFORMATION OF 'POWER OF ATTORNEY HOLDER':

### (a) Details of Your First Choice- Primary Attorney Holder

#### 1. Full Name of Attorney Holder

First Name

Middle Name

Last Name

#### Date of Birth

DD	MM	YYYY
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#### Gender

M	F
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#### Occupation

#### Nationality

☐ Indian

☐ Other

#### Address:

Temporary / Correspondence Address

City

State

Pin Code

Permanent Address

City

State

Pin Code

#### Pan Card / Aadhar Card / Passport number

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Your Relationship with Attorney \_\_\_\_\_

**(b) Alternate Attorney Holder (In case your First Choice is unable to perform the Duties)****1. Full Name of Attorney Holder**

First Name

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Middle Name

--

Last Name

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**Date of Birth**

DD	MM	YYYY
----	----	------

**Gender**

M	F
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**Occupation**

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**Nationality**☐ Indian☐ Other

--

**Address:**

Temporary / Correspondence Address

City

--

State

--

Pin Code

--

Permanent Address

City

--

State

--

Pin Code

--

**Pan Card / Aadhar Card / Passport number**

--

Your Relationship with Attorney: \_\_\_\_\_



**WITNESS(ES):** *(The Attorney Holder or Their Spouse should not be witness)*

**1. Full Name**

First Name

Middle Name

Last Name

**2. Age**

DD	MM	YYYY
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**3. Address:**

Temporary / Correspondence Address

City

State

Pin Code

Permanent Address

City

State

Pin Code

**4. Pan Card / Aadhar Card / Passport Number**

**WITNESS(ES):** *(The Attorney Holder or their Spouse should not be witness)*

**1. Full Name**

First Name

Middle Name

Last Name

**2. Age**

DD	MM	YYYY
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**3. Address:**

Temporary / Correspondence Address

City

State

Pin Code

Permanent Address

City

State

Pin Code

**4. Pan Card / Aadhar Card / Passport Number**

Annexure ‘A’

DETAILS OF ASSETS & LIABILITIES

Details of Assets & Liabilities (for General Power of Attorney)	(Tick If Yes)
<b>Assets</b>	
1. Bank Accounts	<input type="checkbox"/>
2. Fixed Deposits/Bonds	<input type="checkbox"/>
3. Mutual Funds	<input type="checkbox"/>
4. Demat Accounts/Shares	<input type="checkbox"/>
5. Insurance Policies	<input type="checkbox"/>
6. Provident Fund	<input type="checkbox"/>
7. Real Estate	
a. Current place of residence	
i. Owned	<input type="checkbox"/>
ii. Rented	<input type="checkbox"/>
b. Property given on rent/lease	<input type="checkbox"/>
8. Business interest	
(Pls specify if proprietary, partnership or private company)	<input type="checkbox"/>
_____	
_____	
9. Karta of HUF	<input type="checkbox"/>
10. Lockers (pls specify name of bank(s))	<input type="checkbox"/>
_____	
_____	
11. Any other asset not mentioned above	<input type="checkbox"/>
_____	
_____	



### Liabilities

12. Home loan ☐
13. Credit cards ☐
14. Loan against shares/property ☐
15. Statutory Liabilities \_\_\_\_\_ ☐

### Litigations

16. Tax ☐
17. Other statutory litigations (Pls specify) ☐  
\_\_\_\_\_  
\_\_\_\_\_
18. Other private disputes/court cases (Pls specify) ☐  
\_\_\_\_\_  
\_\_\_\_\_

