



**MARWADI**  
FINANCIAL SERVICES

# Finance Guide Book

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Introducing Marwadi's Personal Finance Guide - your key to financial empowerment. From budgeting to investing, tax planning to retirement, this comprehensive book equips you with essential strategies for success. Take control of your finances and secure a prosperous future with Marwadi Shares and Finance Ltd. Get your copy now and unlock your financial potential.



## PERSONAL INFORMATION

First Name	:				
Date Of Birth	:		Place of Birth	:	
Present Address	:				
Permanent Address	:				
Nationality	:				
PAN Card No.	:				
Aadhar Card No.	:				
Passport No.	:				

## BANK DETAILS

### Bank Accounts

A/c. Holder Name Bank Name & Branch A/c. Number Type of A/c. Operating Ins\* Nominee Regesteried no.

A/c. Holder Name	Bank Name & Branch	A/c. Number	Type of A/c.	Operating Ins*	Nominee Regesteried no.

Relationship Manager No. :

### ATM/ Debit Card Details

Card Holder Name Bank Name & Branch A/c. Number Card Number CVV no. Valid till Linked Mobile No.

Card Holder Name	Bank Name & Branch	A/c. Number	Card Number	CVV no.	Valid till	Linked Mobile No.

### Locker Details

In the Name of Bank Name & Branch Code/ Locker no. Rent Rent Renewal Date Nominee Regesteried no.

In the Name of	Bank Name & Branch	Code/ Locker no.	Rent	Renewal Date	Nominee Regesteried no.



## Credit Card Details

Card Holder Name	Card Name	Card Number	CVV No.	Valid till	Linked Mobile No. & Bank

## Important Financial Documents

Particular	Name of Holder	Doc Location (Physical)	Doc Location (Virtual)
Insurance Policies			
Investment Documents			
Property Papers			
Birth Certificate			
Marriage Certificate			
Domicile Certificate			
Important Agreements			
Self/ Spouse/s Will			
Locker Key			
Other Document			

## Important Contacts

Particular	Name of Contact	Contact No.	Email	Address
Family Doctor				
Financial Advisor				
Chartered Accountant				
Lawyer				
Tax Consultant				
Insurance Agent				
Stock Broker				
Mutual Fund Agent				
Other				



### PAN Card Details

Name	Father's/ Husband Name	PAN Number	Login ID & Password for IT Return

### Aadhar Card - UID Details

Name	Aadhar Card Number	Linked Mobile Number

### Passport Details

Name	Passport Number	Issue Date	Expiry Date	Issue Authority

### Driving Licence Details

Name	Licence Number	Issue Date	Expiry Date	Issue Authority

### Election Card Details

Name	Father's/ Husband Name	Identity Card Number	Issue Date



## ONLINE PASSWORDS

Login Kind

Person who is aware of Password

Personal Email

Password Manager

Mobile Phone Unlock


## ASSETS

Deposits 

Bank Name

Locker Number

Key Location

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Fixed / Recurring Deposits

Name of Company / Bank

Amount

Certificate No.

Location

Maturity Date


Properties

Description

Type of usage

Type of usage


Property Ownership Document/Deed Located at:

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Deposits 

Insurance Company

Policy number

Amount


Agent Contact Number :

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Other Insurance (Medical, Accident, etc.)

Insurance Company

Policy number

Amount




### Pension (EPFO, NPS, others)

Name of Company	Pension AC no.	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Equities/Mutual funds

Company Name	Demat AC No. / Folio No.	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Loans Extended

Description	Amount
<input type="text"/>	<input type="text"/>
Any Other : <input type="text"/>	<input type="text"/>

## LIABILITIES

### Loans (Home, Vehicle, Personal, etc.)

Description	Amount
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

## NET WORTH

A. Total Assets (Total value of all savings and investments). :	<input type="text"/>
B. Total Liabilities :	<input type="text"/>
Net worth (A-B) =	<input type="text"/>

## WILL TRUST

Location of will	Executioner's name and address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

