

Action Plan - Miscellaneous

Client Name	Category	Action to be taken	Taken by	Date	Status
Rahul Jain	Income Tax	To file income tax pending for two years	Rahul Jain	2016-06-22	Suggested
Rahul Jain	Mutual Fund	KYC for Shilpa Jain to be done in two weeks	Demo Advisor	2016-06-29	Suggested
Rahul Jain	Life Insurance	Policy documents to be collected from LIC	Demo Advisor	2016-06-23	Suggested
Rahul Jain	General Insurance	Increase Health Insurance sum assured to Rs.10,00,000	Rahul Jain	2016-07-05	Suggested
Rahul Jain	Miscellaneous	PPF cheque submission for the financial year 2016-17 to be done	Rahul Jain	2016-06-28	Suggested
Rahul Jain	Fixed Deposits	Maturity of ICICI Bank FD. Proceeds to be reinvested in MF	Rahul Jain	2016-06-29	Approved
Rahul Jain	Mutual Fund	Updation of contact details in MF	Demo Advisor	2016-06-29	Suggested
Rahul Jain	General Insurance	Rahul Jain should buy a personal accident policy and a critical illness policy.	Demo Advisor	2016-06-28	Suggested
Rahul Jain	Income Tax	Income Tax Outstanding Demand - Rectification against AY 2009-10	Demo Advisor	2016-06-28	Suggested
Rahul Jain	Financial Planning	Next meeting to be held in August 1st week	Demo Advisor	2016-08-01	Suggested