



M/s PRANJAL JOSHI & CO
CHARTERED ACCOUNTANTS

Office No. 9, Suvan, Opp. Jog High School, Myur Colony, Kothrud, Pune – 411038
Tel – 020 – 25 43 02 76, Mob – 98500 35736, e-mail – capranjaljoshi@yahoo.com

Documents required for Registration of Trust and for obtaining approval under Section 80G of The Income Tax Act, 1961

FOUR ORIGINAL SETS OF ALL THE FOLLOWING DOCUMENTS ARE REQUIRED –

1. Covering letter for submission of the documents (will be prepared by us after receipt of all the documents)
2. Form No. 10 A duly signed by any one trustee.
3. Annexure A to Form 10 A – stating the details of Trustees – Names & Residential Address of each trustee.
4. Copy of Trust Deed or any other document which created the trust.
5. Bank Account Xerox – Front Page and Transaction Entry Page (If the trust is old not over 1 year, otherwise copies of Balance Sheet and Income and Expenditure Accounts for last 3 years). Copies of Last 3 years Balance Sheet, Profit & Loss Account along with the copies of Income Tax Return.
6. Form No. 10 G duly signed by any one trustee.
7. Copy of Minutes of first Meeting of the Trust specifying appointment of President, Secretary and Treasurer etc. (only for new trusts) In case of others copy of latest minutes where such appointment was made.
8. Note on objects of trust (same as per object clause of Trust Deed).
9. Details about future projects of the trust (Justification about charitable nature of activities, what projects / activities trust propose to take in next 3 to 5 years & hence requirement of the funds).
10. Xerox copy of PAN Card.
11. Xerox copy of Registration certificate under Bombay Public Trust Act and / or Societies Registration Act. Last 80G approval Letter.
12. Certificate for non-violation of Section 13(1)(c).
13. Certificate declaring non-receipt of any domestic or foreign grant and donation.
14. Certificate declaring investment u/s 11(5) of the Income Tax Act, 1961.
15. Certificate declaring Bankers of the trust.
16. Stamp paper of Rs. 100/- in favor of the trust for giving Power of Attorney.
17. Court fee stamp of Rs. 5/-



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Formats – (to be typed on the letterhead of the trust)

ITEM No. 2 Annexure A

Sr. No.	Name of the Trustee	Address of the trustee

ITEM NO. 11 –

Certificate u/s 13 (1)(c)

This is to certify that no part of the income since the inception of the trust has been applied directly or indirectly for the benefit of any person as referred in Section 13(3) of The Income Tax Act, 1961

Names of all trustees

Signatures

ITEM NO. 12 –

This is to certify that the trust has not received any donation, voluntary contribution, grant or any other receipt towards corpus fund since the inception of the trust. Further the trust has also not received any foreign grant and donation.

Names of all trustees

Signatures

ITEM NO. 13 –

No surplus is available with the trust as the trust has been recently formed. Further we certify that the trust does not have any investment other than the bank a/c no. _____ with _____ Branch of _____ Bank. As such we certify that the investments of the trust are in the modes prescribed u/s 11(5) of The Income Tax Act, 1961

Names of all trustees

Signatures

ITEM NO. 14 –

The trust has recently opened bank account with _____ branch of _____ bank and the Account No. is _____. We certify that except for this the trust has no other bank account & / or investments.

Names of all trustees

Signatures