The Institute of Chartered Accountants of India

Capacity Building Initiatives of the Committee for Members in Practice (CMP), ICAI

CA. Satish Kumar Gupta
Chairman, CMP, ICAI

Unsecured Term Loan Facility

Product Features

a) Minimum loan amount INR 2 lakh and max INR 30 lakh.

b) Rate of Interest – 9.99 % p.a. upto 36 months (reducing balance method).

c) Collateral Free Loan & No Processing Fee

d) Takeover of high cost existing loans.

Web Link to submit loan application:

· For professional loan to individuals in whole time practice - https://www.poonawallafinance.com/professional-loan-application/

· For personal loan to individuals in whole-time employment - https://www.poonawallafinance.com/personal-loan-application/

NAME	MOBILE NUMBER	EMAIL ID
ESCALATION MATRIX – LEVEL 1:		
Ashutosh Sharma	8669984720	ashutosh.sharma@poonawallafinance.com
Atul Bichave	8669971433	atul.bichave@poonawallafinance.com
Shashishekhar Hiremath	9130033608	shashishekhar.hiremath@poonawallafinance.com
ESCALATION MATRIX – LEVEL 2:		
Sujit Thite	8669926668	sujit.thite@poonawallafinance.com
Manoj Gujaran	8669977242	manoj.gujaran@poonawallafinance.com

Note: Due to Complete lock down at Pune, the processing of loan will take some time, please bear with the company.

Credit Card facility

1. **Life Time Free for all Members**

2. **Minimum Credit Limit ₹ 1 lakh**

3. **Airport Lounge Facility & Add on Cards facility**

4. **Professional Indemnity Insurance upto Credit limit**

Tollfree: 1800 225 100
Email at:
crm@bobfinancial.com

Please Apply for the same at:

https://www.bobfinancial.com/creditcard-application-form-ICAI.jsp

Note: Due to lock down at Mumbai, the processing of Credit Card will take some time, please bear with the company.

Papilio Office Management Software

1. **Secured cloud based software**

2. **Available in mobile app.**

3. **Work Management, client Management, Document Management, Time Management, Invoicing & Collection Tracking, elaborate dash board, expenses management, notifications, user management, detailed audit trail etc.**

4. **Free for Life less than 5 users & discount for more users**

Contact at:
Telephone:
+ 91 - 9845198905
E-mail Id:
rjonnagadla@indygosoft.com

Web link to access Papilio
https://papilio.co.in/icai.html

RuleZbook: Mobile App for Legal Updates

1. Covers Acts comprehensively under 7 Categories of Law (Labour, Finance & Taxation, EHS, Commercial, Regulatory Laws, Local and Miscellaneous Laws

2. Provides a detailed description of statutory compliance requirement including due dates, penal provisions, relevant forms, regulatory links, regulatory updates, etc. for each Compliance line item

3. All Legal Updates available on the App on a real time basis

4. Advanced search features with options to define favorites / watchlist to get auto notifications for legal updates on a periodic basis

FREE for 3 years

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

Registration Link: https://avantis.co.in/ca/registration/

Audit Module (Workflow with Standard Audit Checklist)

This Platform covers end-to-end life cycle of Audit Functions including all touch points between Auditors & Auditees.

1. Facilitates risk based audits (i.e. linkage of audit steps to identified risks)
2. Audit checklist can be configured updated on a client to client basis (per specific requirement) & Covers Audit Planning / Scheduling
3. Audit documentation facility with options to upload "Working Files"
4. Real time "Review / Quality Check" workflow wherein audit steps can pushed to "Reviewers"

FREE for 3 years upto 05 users per CA firm and free up to 25 Audits/Year

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

Registration Link:
https://avantis.co.in/ca/registration/

Legal Compliance Management

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

1. Tracking of all legal compliances
2. Real Time Legal Updates
3. Comprehensive & current database with 1,400+ Acts, 60,000+ Compliances, 3,000+ Filings across States, Union Territories & Local bodies
4. Comprehensive Compliance Document Repository

Registration Link: https://avantis.co.in/ca/registration/

FREE for 3 years upto 05 Users per CA Firm and FREE Up to 25 Customers (Single Entity and Single Location)

Payroll Processing and Labour Compliance

1. Automatic generation of Labour Compliance documents (Returns and Registers)
2. Easy to Use facility with basic Input upload files for compliance document generation
3. Quick and easy Onboarding & Compliance Calendars
4. Centralized Document Repository

<u>Free for 3 years upto 05 Users per CA Firm and FREE Up to 25 Customers with employee strength < 25 (Single Entity & Single Location)</u>

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

Registration Link: https://avantis.co.in/ca/registration/

Board Module for Secretarial Compliances

1. Automatic generation of all Compliance Documents
2. "Records & Documentation" (i.e. Ready-to-use Formats for Notices, Agenda, Resolutions & Minutes)
3. Generation of the "e-Forms" required by Ministry of Corporate Affairs (MCA)
4. Comprehensive compliances listing required for each Agenda and comprehensive Activity Checklist
5. Complete Secretarial and SEBI laws / rules, regulations & notifications available on a "Real-Time basis"

Free for 3 years upto 05 Users per CA Firm and FREE Up to 25 Private Companies (Single Entity)

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

Registration Link: https://avantis.co.in/ca/registration/

Legal Compliance Audit Module

1. The Product will facilitate generation of broad compliance list applicable to customers based on certain inputs.

2. The said checklist can be utilized for auditing the compliances for the customers manually.

Free for 3 years upto 05 Users per CA Firm and FREE Up to 25 Customers (Single Entity and Single Location)

Contact Details:
Email:
Sandeep@avantis.co.in
Mobile: +91 98234 92350

Registration Link: https://avantis.co.in/ca/registration/

Practice Management Module

1. Flexible workflow wherein CA Firms will be able to use digital workflows to manage assignments.

2. It will facilitate all "Touch Points" between the Teams and with the Customers via the Platform itself and all data / documents could be securely shared within the Platform itself.

3. To Manage data privacy and access controls.

FREE for 3 years upto 05 Users per CA Firm and FREE
Up to 25 Customers

Tally.ERP 9 Gold Edition (Multi-User version)

1. **80% discount on Tally.ERP 9 Gold is applicable for all full-time practicing CAs/CA firms for purchases made before 15th July 2020, post which a 50% discount is applicable Note: We are trying for extension of the same**

2. **80% discount on Tally.ERP 9 Gold continues to be applicable for CAs setting up practice newly (who have enrolled for practice on or after 1st January 2018) to encourage them in the beginning of their professional journey**

3. **50% discount is applicable on Tally Software Services (TSS) renewals for licenses purchased under any special CA schemes from Tally**

Email:
support@tallysolutions.com

For details, Please visit at https://cmpbenefits.icai.org/

Quick Heal Total Security For Android enabled Mobiles and Desktops/laptops

Core Protection

AntiVirus, Total Ransomware Protection, AntiSpyware, AntiMalware, AntiRootkit, Firewall, Intrusion Detection & Intrusion Prevention

Available at discounted price for the Members & Students of ICAI

Contact Details:
Email:
rajeev.waybhat@quickheal.co.in
For détails, Please visit at
https://cmpbenefits.icai.org/

Practice Management Software for Members in Practice & CA Firms of ICAI

1. **Tracking the geo location of article**
2. **Mobile Application**
3. **Leave management**
4. **Meeting Management**

Contact Details:
Email:
support@simplifypractice.com

For details, Please visit at
https://cmpbenefits.icai.org

Free of Cost to the Practising Members & CA Firms upto 31st October, 2020

All-in-One Accounting & Compliance Software for Chartered Accountants

Powered by Automation and AI

Highly Secure

Seamless Data Migration

Cloud-based Anywhere Anytime Access

FREE 10GB Cloud Storage

hb GST

hb Accounts

hb TDS

Role-based Access Control

hb E-Way

hb TAX

24/6 Dedicated Support

hb All-in-One

One Stop Solution

Free upto 3 users

Email ID:
helpline@hostbooks.com

For details, Please visit at
https://cmpbenefits.icai.org

XBRL Software

1. **Preparation of XBRL Returns for C&I and Cost & Accounting**

To avail the aforesaid Software, may Subscribe on link http://bit.Iy/icai-xbrl

2. **Free for 10 filings for New Subscribers & Discounted price for existing Subscriber**

E-mail: info@kdksoftware.com

For détails, Please visit at https://cmpbenefits.icai.org/

GST Annual Returns (GSTR-9 & 9C) software

The Committee has worked an arrangement for 'GST Software (Annual Returns)' for Members in Practice and CA Firms.

1. GST Invoicing for Practitioners / Firms for "Free"
2. Preparation of GST Annual Returns (GSTR-9 & 9C)
3. 20% more data Auto-Population compared to GSTN Portal including complex tables of Amendment i.e. 10 & 11
4. GSTR-9 Filing is significantly Faster and Better

Members in Practice and CA firms desirous to avail the aforesaid software may please visit https://icai.expressgst.com and Sign up.

Free of Cost for 5 GSTINS & Discounted price for more than 5 GSTIN

E-mail:
info@kdksoftware.com

For détails, Please visit at
https://cmpbenefits.icai.org/

EFF factor software for the Practitioners/CA Firm of ICAI

1. Track job wise profitability
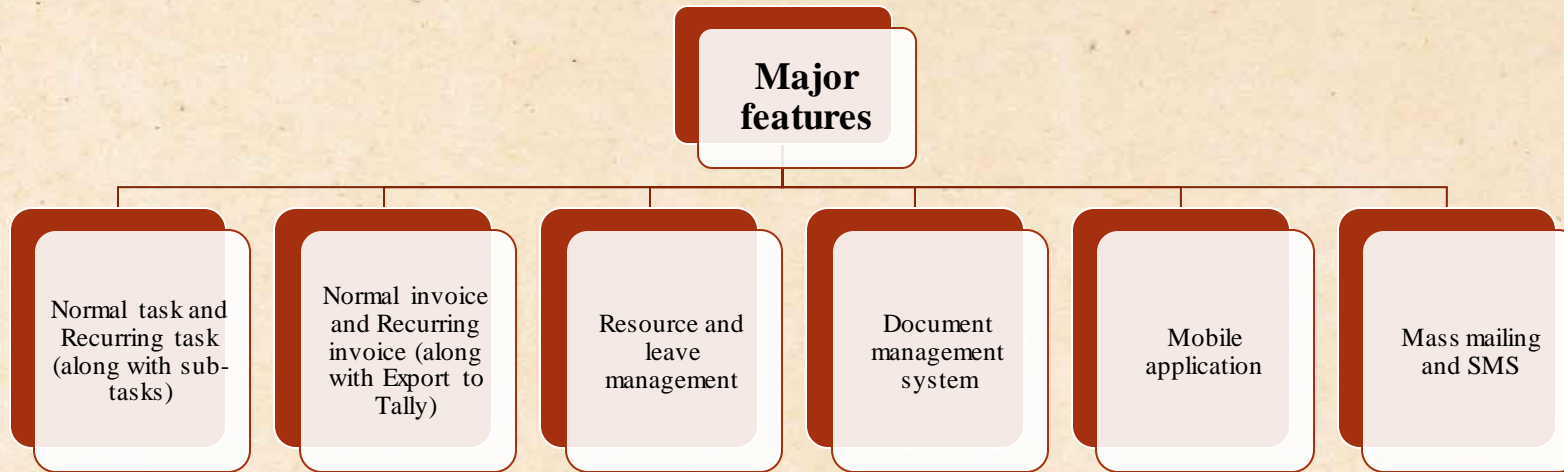2. Multiple reports for the management
3. Automated Billing

For availing this offer by all the CA Firms/Practising Members of ICAI, please visit www.efffactor.com & to avail this offer,
E-mail at: contact@efffactor.com

The same is available at 50% discount

email at
contact@efffactor.com

For details, Please visit at
https://cmpbenefits.icai.org/

CORDL Practice Management software

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                    ┌──────────────┐
                    │    Major     │
                    │   features   │
                    └──────────────┘
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| Normal task and Recurring task (along with sub-tasks) | Normal invoice and Recurring invoice (along with Export to Tally) | Resource and leave management | Document management system | Mobile application | Mass mailing and SMS |

The same is free of cost to CA Practitioners & Firms upto 3 Users & Discounted price for more than 3 users. Members and CA firms desirous to avail the aforesaid software may please visit https://cmpbenefits.icai.org & online solution for same.

Contact at
ccbmpsales@cordl.in

For details, Please visit at https://cmpbenefits.icai.org/

LIC Group term Insurance for Members of ICAI

For details, Please visit at
https://cmpbenefits.icai.org/

1. No Health or Medical Underwriting is required.
2. Attractive Rate of Premium & Annual Premium payment for the Sum Assured of Rs 10 Lakhs & the spouse of the member may also avail this facility of Rs 5 Lakhs
3. Claim in case of death due to any reason
4. Members and students may purchase the Term Insurance online through the website https://cmpbenefits.icai.org

Health Insurance

1. Floater Sum insured up to 20 lacs for family and 10 lacs for dependent parents under a single policy.
2. Discounted premium for the members/ students of ICAI.
3. Get covered with this policy even with out attending any health check-up.
4. Life long coverage assured without any upper age limit.
5. Partial coverage for pre-existing disease from the first year of policy.
6. Attractive Room rent and ICU charges
7. COVID-19 coverage

Contact Details:
Email:
johns.paulose@newindia.co.in

For details, Please visit at
https://cmpbenefits.icai.org

Motor Insurance

1. Coverage for your Private Car and Two wheeler.
2. Cover all the risks covered under Motor liability policy plus
3. loss or damage caused to the vehicle
4. Attractive discount of 85% on the own damage premium (as per proposed MOU)
5. 30% discount on add on covers of private car (as per proposed MOU)

Professional Indemnity Insurance

1. Our professional indemnity insurance complies with your requirements
2. Get a choice of cover levels – up to Rs.5 Crores with cascading limits starting from Rs. 50 Lacs – to insure your business .
3. Considering the challenges faced by both Practicing Chartered Accountants and Chartered Accountants in Employment.
4. Professional indemnity policy cover against compensation payments and legal costs.
5. Covers for awards and settlements of claims, as well as the costs incurred in investigating, defending or settling a claim made against you.

Office Protection Shield Policy

1. We indemnify you against liability as tenant of the office premises for damages to the building and fixture and fittings.
2. Covers all the perils which may cause damages to your office premises.
3. A comprehensive policy which provides coverage to 12 sections.

Contact Details:
Email:
johns.paulose@newindia.co.in

For détails, Please visit at
https://cmpbenefits.icai.org

Personal Accident Policy

1. Accident coverage for you and your family.
2. This policy offers compensation in case of death or bodily injury to the insured person.
3. Compensation in the event of death, Permanent total disablement, permanent partial disablement or temporary total disablement of the insured member.
4. Highly discounted premium compared to other PA policies in the market.

House Holder Insurance

1. Protect home against various risks/perils.
2. Coverage extended to the contents of your home including Furniture, Fixtures, Fittings, Domestic Appliances, Jewellery etc.
3. A package policy which covers 9 sections under one umbrella.

30 CPE Hours Virtual Certificate Course on Preparation of Appeals, Drafting of Deed & Documents and Representation before Appellate Authorities and Statutory Bodies

Capacity Building Measures of Practitioners/ CA Firms

30 CPE hours Virtual Certificate Course on Wealth Management and Financial Planning (WMFP)

Capacity Building Measures of Practitioners/ CA Firms

MoU with World Bank

Capacity Building Measures of Practitioners/ CA Firms

1. Knowledge enhancement of the Members of ICAI in Procurement Audit & thereof.

2. World Bank offer Training Programme on Procurement Audit in Association with ICAI

Revised Minimum Recommended Scale of the fees for the Professional Assignments done by the Chartered Accountants for Class 'A' & Class 'B' & Class 'C' Cities

Revised Minimum Recommended Scale of the fees for the Professional Assignments done by the Chartered Accountants for Class 'A' , Class 'B' & Class 'C' cities is available at https://cmpbenefits.icai.org/wp-content/uploads/2020/02/Details-download.pdf for the reference of Members in Practice/CA Firms.

Capacity Building Measures of Practitioners/ CA Firms

OFFICE MANAGEMENT MANUAL FOR MEMBERS IN PRACTICE

Committee for Members in Practice
The Institute of Chartered Accountants of India
(Set up by an Act of Parliament)
New Delhi

Capacity Building Measures of Practitioners/ CA Firms

Please access the Book at :
https://resource.cdn.icai.org/60284cmp49102.pdf

The Content of the book are Client relationship management, Human resource management including articles management, Technology management, Assignment management, Virtual office management & Suggested formats

For Any problems, please connect with

👥 **Dr. Sambit Kumar Mishra, Secretary, CMP, ICAI**

Telephone: 0120-3045994

E-mail: ccbcaf@icai.in

Connect for clarifications from the Committee

CA. Satish K. Gupta
Central Council member & Chairman, CMP), ICAI

Thank You!

CA. Prasanna Kumar D.
Central Council member & Vice Chairman, CMP, ICAI