

Action Plan - Miscellaneous

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