



CANJAIN GLOBAL ADVISORS

Associate Empanelment Kit

For Chartered Accountants, Company Secretaries, Cost & Management Accountants and
Advocates

Associate	_____
Profession	CA / CS / CMA / Advocate (strike out whichever is not applicable)
Associate ID	CGA/ASC/_____/____
Issued by	Canjain Global Advisors Private Limited (CGA), CIN U69201DL2025PTC450616, GSTIN 07AAMCC8508Q1ZW
Kit version	1.1 - October 2026

Documents in this kit

1. Associate Application & Professional Details Form
2. Associate Empanelment Agreement (with Schedule A - Fees & Payment, Schedule B - Work Order format)
3. Confidentiality & Data Protection Undertaking
4. Declaration of Professional Standing, Independence & Conflict of Interest
5. Consent for Display of Profile & Photograph on cgaindia.com

How to sign

Please sign this complete PDF electronically using **(a)** your Class 3 Digital Signature Certificate (DSC), or **(b)** Aadhaar-based eSign through any licensed eSign service provider. Both are valid electronic signatures under Section 3A read with the Second Schedule of the Information Technology Act, 2000. A single DSC / eSign applied to the complete PDF covers all five documents; please also fill your details in the blanks before signing (type into the PDF or print, fill, sign by hand and scan as a fall-back).

Return the signed PDF along with the attachments below to **admin@cgaindia.com**. CGA will countersign the Agreement and email you the fully executed copy and your Associate ID confirmation.

Attachments to send with the signed kit

- Copy of membership certificate / Bar Council enrolment certificate
- Copy of current Certificate of Practice (CA / CS / CMA) - not applicable for Advocates
- Firm registration (FRN / Unique Code) if practising through a firm
- PAN card copy and GST registration certificate (if registered)
- Cancelled cheque or bank letter for payment of professional fees
- One recent professional photograph (only if you consent to the website profile in Document 5)

Document 1 - Associate Application & Professional Details Form

To be filled by the applicant. All information is used only for verification and empanelment.

A. Personal & contact details

Full name (as per membership records)	
Profession	
Mobile	
Email	
Office address	
City / State	
Date of birth	
PAN	
GSTIN (if registered)	

B. Professional registration

Institute / Bar Council	
Membership / Enrolment No.	
Year of qualification / enrolment	
Certificate of Practice No. and validity	
Firm name and FRN / Unique Code (if any)	
Status in firm (Proprietor / Partner / Employee)	

C. Practice profile

Areas of practice	
Years in practice	
States / cities you can cover	
Team size (qualified / semi-qualified)	

D. Bank details for payment of professional fees

Account holder name	
Bank, branch and IFSC	
Account number	

I confirm that the information above is true and complete, and I authorise CGA to verify my membership / enrolment status with the concerned Institute or Bar Council.

Applicant

Name: _____
Membership No.: _____
Date: _____ Place: _____

Document 2 - Associate Empanelment Agreement

Principal-to-principal engagement of an independent professional

This Agreement is made on the date of the last electronic signature below between **Canjain Global Advisors Private Limited ("CGA")**, a company incorporated under the Companies Act, 2013 (CIN U69201DL2025PTC450616; PAN AAMCC8508Q; GSTIN 07AAMCC8508Q1ZW), having its registered office at Plot No. 1, Kh. No. 721, MIN Upper Ground Floor, Lal Dora, Burari Road, Burari, North Delhi - 110084, acting through its Director, Mr. Neeraj Jain, duly authorised by its Board of Directors, of the first part; and _____, a practising professional whose particulars are given in Document 1 (the "**Associate**"), of the second part. CGA and the Associate are each a "Party".

1. Purpose

CGA serves clients across India in tax, GST, corporate, compliance, audit-support and legal matters. The Associate is an independent practising professional. The Parties wish to work together on specific assignments, each Party retaining its own professional identity and responsibility.

2. Nature of relationship

2.1 The relationship is strictly principal-to-principal. Nothing in this Agreement creates a partnership, joint venture, network, employment, agency or franchise between the Parties.

2.2 There is no sharing of profits or fees between the Parties. Each assignment is paid for as a professional fee for work actually performed, as set out in Schedule A.

2.3 **No fee is payable by the Associate to CGA** for empanelment, listing, referral or allotment of work, and CGA shall pay no commission, brokerage or referral fee to the Associate for procuring clients.

2.4 The Associate shall not hold out as a partner, branch, employee or agent of CGA, and shall not use the CGA name or logo on letterheads, reports, visiting cards or social media, except the description "Empanelled Associate of CGA" where consented to under Document 5.

3. Assignments

3.1 CGA may offer assignments by a written Work Order (Schedule B) sent by email or through CGA's practice management system. The Associate is free to accept or decline any Work Order.

3.2 An accepted Work Order fixes the scope, deliverables, timeline and fee. Changes in scope require a revised Work Order.

3.3 Nothing in this Agreement obliges CGA to offer any minimum volume of work.

4. Professional responsibility

4.1 The Associate shall perform every assignment personally or under direct supervision, with due care, and in compliance with the Act, Regulations, Code of Ethics and guidelines of the Associate's own Institute or Bar Council.

4.2 Any certificate, audit report, attestation, return requiring professional signature, vakalatnama or pleading shall be signed only by the Associate in the Associate's own name and membership / enrolment number, and the Associate alone is professionally responsible for it. CGA shall not direct the Associate's professional judgement.

4.3 The Associate shall not accept any attest or audit assignment where independence would be impaired and shall disclose any conflict of interest before accepting a Work Order.

4.4 The Associate shall keep working papers for the period prescribed by the Associate's Institute and by applicable law.

4.5 CGA is a company and does not itself practise as chartered accountants, company secretaries, cost accountants or advocates. Where a Work Order involves work that the law reserves for a practising professional (including audit and attest functions, statutory certification, and appearance or pleading as an advocate), the Associate shall accept that work in the Associate's own professional capacity, the engagement letter or vakalatnama shall be in the Associate's own name, and the professional fee for that reserved work shall be billed by the Associate directly to the client. CGA's role in such matters is limited to coordination and non-reserved support services, for which CGA alone bills the client.

5. Clients

5.1 Clients introduced through CGA remain clients of CGA for the purpose of this engagement. During the term of this Agreement, the Associate shall not directly solicit such clients to move their work away from CGA.

5.2 Nothing in this Agreement restrains the Associate from carrying on the Associate's own profession, or a client from freely choosing a professional, and this clause shall be read consistently with Section 27 of the Indian Contract Act, 1872.

6. Confidentiality & data protection

The Associate shall comply with Document 3 (Confidentiality & Data Protection Undertaking), which forms part of this Agreement and survives its termination.

7. Fees, invoicing & taxes

As per Schedule A. Fees are paid net of tax deducted at source under the Income-tax law in force, and GST is payable where the Associate is registered and the law so requires.

8. Indemnity & liability

8.1 Each Party is responsible for its own professional acts and omissions. The Associate shall indemnify CGA against claims, penalties and costs arising from the Associate's negligence, misconduct or breach of this Agreement.

8.2 Neither Party is liable to the other for indirect or consequential loss. The Associate is encouraged to maintain professional indemnity insurance.

9. Term & termination

9.1 This Agreement is valid for one year from execution and renews automatically for further one-year periods unless either Party gives notice.

9.2 Either Party may terminate by 30 days' written notice. CGA may terminate immediately if the Associate's membership, Certificate of Practice or enrolment is suspended or cancelled, if disciplinary findings are recorded against the Associate, or for breach of confidentiality.

9.3 On termination, the Associate shall complete or hand over open Work Orders as CGA reasonably directs, shall be paid for work completed, and shall return or securely delete client data.

10. Communications

Notices are valid when sent by email to admin@cgaindia.com (for CGA) and to the Associate's email in Document 1.

11. Governing law & disputes

This Agreement is governed by the laws of India. Disputes shall first be attempted to be resolved by mutual discussion within 30 days, failing which they shall be referred to a sole arbitrator appointed by mutual consent under the Arbitration and Conciliation Act, 1996, with the seat and venue at Delhi and proceedings in English. Subject to this, courts at Delhi shall have jurisdiction.

12. Electronic execution

This Agreement may be executed electronically by DSC or Aadhaar eSign under the Information Technology Act, 2000, and in counterparts, each of which is an original. It is the entire agreement between the Parties on its subject and may be amended only in writing signed by both Parties.

Associate _____ Name: _____ Membership No.: _____ Date: _____ Place: _____	CGA _____ For Canjain Global Advisors Private Limited Neeraj Jain, Director (Founder & CEO) Date: _____ Place: Delhi
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Schedule A - Fees & Payment Terms

- A1. The fee for each assignment is the amount stated in the accepted Work Order (fixed fee, per-return, per-hearing or hourly, as stated). No fee is payable for assignments the Associate declines.
- A2. The Associate raises an invoice on CGA after delivery of the Work Order, quoting the Work Order number. Invoices issued by a GST-registered Associate shall be valid tax invoices.
- A3. CGA pays within 15 days of receipt of a correct invoice, after deduction of TDS as applicable, and issues the TDS certificate in the prescribed form.
- A4. Out-of-pocket expenses (travel, government fees, court fees, stamp duty) are reimbursed only if pre-approved in writing and supported by receipts.
- A5. Where an Advocate renders legal services to CGA itself (as opposed to a client), GST, if any, is discharged by CGA under the reverse charge mechanism as notified, and the Associate shall issue an invoice without charging GST on such services.
- A6. If a deliverable is rejected for deficiency, the Associate shall rectify it at no extra cost within the timeline stated in the Work Order.

Schedule B - Work Order format

Work Order No. / Date	CGA/WO/____/____ dated _____
Client reference	(client code - full details shared on acceptance)
Nature of work	
Deliverables	
Timeline / due date	
Fee and basis	Rs. _____ (fixed / per item / per hearing)
CGA coordinator	
Acceptance by Associate	Accepted by email reply "Accepted - WO No. ____"

Document 3 - Confidentiality & Data Protection Undertaking

Forms part of the Associate Empanelment Agreement

I, _____, undertake to Canjain Global Advisors Private Limited (CGA) as follows:

1. **Confidential information** means all client names, documents, financial data, returns, notices, case papers, pricing, processes and any other information received from or through CGA, in any form. It does not include information already in the public domain other than by my breach, or which I am required by law, a court or my Institute to disclose (in which case I shall inform CGA promptly where lawful).
2. I shall use confidential information only to perform the accepted Work Order, and shall not disclose it to any person except my staff who need it for the work and who are bound by equal confidentiality obligations.
3. In handling personal data of clients, I shall act only on CGA's documented instructions and shall comply with the Digital Personal Data Protection Act, 2023 and rules made under it, and with my professional duty of confidentiality.
4. I shall keep data on secured devices and accounts, shall not upload client documents or credentials to public AI tools or unsecured storage, and shall never ask a client for portal passwords or OTPs except as expressly approved in the Work Order.
5. I shall inform CGA within 24 hours of becoming aware of any loss, leak or unauthorised access to client data.
6. On completion of a Work Order or on termination, I shall return or securely delete client data, except copies I must keep under law or my Institute's working-paper requirements, which shall remain confidential.
7. These obligations continue after the Agreement ends.

Associate

Name: _____
Membership No.: _____
Date: _____ Place: _____

Document 4 - Declaration of Professional Standing, Independence & Conflict of Interest

I, _____, declare that:

1. I am a member in good standing of the Institute / Bar Council named in Document 1 and, where applicable, hold a valid Certificate of Practice.
2. No order suspending or removing my name from the register is in force, and (tick one) ☐ no disciplinary proceedings are pending against me / ☐ the following proceedings are pending:

3. I shall inform CGA within 7 days of any change in my membership, Certificate of Practice, enrolment, or of any disciplinary or criminal proceedings against me.
4. I shall disclose any relationship, interest or prior engagement with a client or opposite party before accepting a Work Order, and shall not accept work where a conflict exists.
5. I shall not accept any audit or attest engagement through CGA where my independence would be impaired under my Institute's requirements, and I remain within the audit and tax-audit ceilings applicable to me.
6. I have not paid, and shall not pay or receive, any commission, brokerage or share of fees for the procurement of professional work in connection with my empanelment.
7. I understand that empanelment does not make me a partner, employee or agent of CGA, and that CGA does not guarantee any volume of work.

Declarant

Name: _____
Membership No.: _____
Date: _____ Place: _____

Document 5 - Consent for Display of Profile & Photograph on cgaindia.com

Optional - empanelment does not depend on this consent

I, _____, choose one option:

- ☐ **I consent** to CGA displaying the following on cgaindia.com, in its associates section and related materials: my name with professional prefix, profession, city, areas of practice, years of experience and my photograph.
- ☐ **I do not consent** to any public display of my details.

Conditions of consent

1. My mobile number, email, membership number, PAN and address shall not be displayed publicly.
2. I shall be described only as "Empanelled Associate", never as a partner, branch or employee of CGA, and the display shall be factual, without any claim of superiority, client names or fees, in keeping with the advertisement and website guidelines of my Institute / Bar Council.
3. The logo of my Institute shall not be used in my profile on cgaindia.com.
4. I may withdraw this consent at any time by email to admin@cgaindia.com, and CGA shall remove my profile and photograph within 7 days of the request.
5. I confirm that I own or am entitled to use the photograph I provide.

Associate

Name: _____
Membership No.: _____
Date: _____ Place: _____