

# CapitalBox – Loan & Document Consultancy Consent

## Client Details

Client Full Name: \_\_\_\_\_

Father's / Spouse's Name: \_\_\_\_\_

Mobile Number: \_\_\_\_\_

Email (if any): \_\_\_\_\_

Address: \_\_\_\_\_

Date of Consent: \_\_\_\_ / \_\_\_\_ / 20\_\_\_\_

## 1. Purpose of Consent

I, the undersigned, hereby give my voluntary and informed consent to CapitalBox to assist me in services related to loan documentation and financial consultancy. I understand that the services are strictly related to document preparation, profile readiness, and application guidance. I acknowledge that this consent is being given without any pressure or obligation.

## 2. Nature of Services

CapitalBox provides support in preparing income documents, checking loan eligibility, compiling financial profiles, and offering advice for document-based loan readiness. The company does not function as a bank, DSA (Direct Selling Agent), or lender. The assistance is strictly limited to preparing accurate paperwork and advising clients regarding process and documents.

## 3. Personal Data Usage

I understand and accept that CapitalBox may collect and use my personal and financial documents such as PAN card, Aadhaar, bank statement, income proof, etc., solely for the purpose of providing document-related consultancy. My data will not be misused, shared, or sold to any third party without my written permission.

## 4. Communication Consent

I hereby authorize CapitalBox to communicate with me **only via email and phone calls** for service-related updates, document requests, clarifications, or follow-ups. I agree to respond in a timely manner over these communication modes to ensure smooth and successful completion of the consultancy process.

## 5. Consultancy Fee Declaration

I am aware that CapitalBox charges a fixed fee for its documentation support based on the complexity and urgency of the work. I agree to pay this fee as disclosed to me in advance. I also accept that this fee is **non-refundable** once the service is initiated, regardless of any third-party loan approval outcome.

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## 6. Communication Consent

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## 7. Legal Clarity

I acknowledge that CapitalBox is a private consultancy platform that provides support limited to **loan-related document preparation, eligibility guidance, and paperwork consultancy**. CapitalBox does **not function as a bank, NBFC, agent, or legal representative** under any law. All services are provided in accordance with applicable Indian laws and are focused solely on lawful financial documentation assistance. I confirm that I am engaging CapitalBox services purely for the lawful purpose of preparing and understanding documents related to personal or business loan applications.

## 8. Voluntary Declaration

**I declare that I have read and understood this entire consent form. I am signing it voluntarily and without any misrepresentation or pressure. I take full responsibility for the authenticity of the documents provided by me.**

Client Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / 20\_\_\_\_

CapitalBox Representative: \_\_\_\_\_

Signature & Company Seal: \_\_\_\_\_