STD. XI Commerce
Secretarial Practice

Salient Features:

• Exhaustive coverage of syllabus in Question Answer Format.
• Covers answers to all Textual Questions.
• Relevant Marking Scheme for Each Question.
• Includes Additional Important Questions for better preparation.
• Mnemonics to facilitate easy answer recall.
• Quick Recap at the end of each chapter to facilitate quick revision.
• Simple and Lucid language.
• Includes GG - our very own mascot.

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We present to you "Std. XI Commerce: Secretarial Practice" with a revolutionary fresh approach towards content thus laying a platform for an in-depth understanding of the subject.

This book has been written according to the revised syllabus and guidelines as per the State Board and covers answers to all textual questions.

In addition to this, we have included extra questions in each lesson that not only aim at covering the entire topic but also make students ready to face the competition. The sub-topic wise classified “Question and Answer” format of this book helps students in easy comprehension.

Furthermore, we have provided model answers to each question in the form of pointers which makes it easy for students to memorize and reproduce the answers in their examinations.

We have incorporated “Mnemonics” to facilitate easy answer recall. Every chapter ends with a Quick Recap to facilitate quick revision of the lesson learnt. The model questions are provided with relevant marking schemes so as to highlight the importance of each question.

We are sure this study material will turn out to be a powerful resource for students and facilitate them in understanding the concepts of this subject in the most lucid way.

The journey to create a complete book is strewn with triumphs, failures and near misses. If you think we've nearly missed something or want to applaud us for our triumphs, we'd love to hear from you.

Please write to us on: mail@targetpublications.org

Best of luck to all the aspirants!

Yours faithfully,
Publisher

Gyan Guru (GG)

We present to you our mascot 'GG', who has been proudly introduced by us. GG is a student-buddy who pops up throughout the book and draws your attention to important bits of knowledge also termed as 'Good to Know'. These 'Good to Know' sections help you understand a concept distinctly with a corresponding example from your immediate environment. This is our initiative in education that helps linking learning to life and we're hopeful that you are going to love it.
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01. Secretary

Introduction

Usha had just graduated in commerce and had a bright career ahead of her. She started her job hunting spree and soon got a call from the HR department of a leading MNC for a profile of a secretary. She was overjoyed at first and confirmed her availability for the interview. She told her family regarding the opportunity at hand. They exhibited mixed feelings. Her father was of the view that a secretary’s job does not offer much scope in terms of career. He felt that a secretary’s job is restricted to noting down instructions and following them without applying one’s intellect. Usha was thoroughly confused by now. Her elder sister Akansha who worked as a senior manager in a corporate stepped in to resolve the issue. She asked Usha to show her the job description for the said opening. Usha promptly showed her a copy of the job description. Akansha read the job description meticulously and as she finished reading it, she had a broad smile on her face that signified hope. She then explained to her father that the role being offered is not of a traditional secretary but a dynamic one. The role would include decision making, drafting correspondence, conducting meetings etc. which would mould her sister’s personality as well as enhance her intellectual capabilities. Her father was still not fully convinced but allowed her daughter to attend the interview.

The next day she reached the venue for the scheduled interview along with her certificates. She was soon called inside by the HR Manager. After some preliminary tests and viva, she was found suitable for the job. The HR manager then briefed her regarding the job profile being offered. The HR manager intimated her that she had performed exceptionally well in the tests and viva and thus the company is offering her a a much wider role. This role according to her would include all facets of secretarial function like managing office work and decision making, conducting meetings, drafting correspondence and co-ordinating with various departments. Usha was overjoyed and called her father as soon as the interview got over. He too was satisfied that her daughter had taken the right decision and got a wonderful career opportunity. He congratulated her and wished her all the best!

In this chapter, we will learn about the changing concept of a secretary, its features and importance in the dynamic world of today.

Is the appointment of a Secretary essential in the present scenario?

- Due to Globalization, the world has turned into a large market place. It has helped to convert the local and regional market to national and international market.
- Due to this, there is tough competition all over the business world.
- Thus, it has become vital for all the entrepreneurs to strive hard, create business opportunities, seize them and fully utilize such opportunities in order to survive and grow in the market.
- However, for proper growth and expansion of the business concern, an expert possessing special knowledge and capabilities is required to assist on various matters. Secretary is one such expert individual who assists the management in carrying out the operations of the business smoothly and efficiently.
- Due to change in science and technology, the modern business world has been rapidly changing. Due to such changes, the activities are to be undertaken by a group of people in an organized manner which can help them achieve certain business objectives.
- The need for appointment of a Secretary is felt because of the need to perform certain jobs of routine nature.
- Usually, a secretary is appointed to look after the day-to-day business affairs of the various concerns such as firms, trade associations, sports clubs, co-operative societies, trade unions, government departments, non-profit associations etc.
- He is expected to perform certain routine office functions such as managing office and office work, conducting meetings, co-ordinating with all the departments, maintaining public relations, conducting correspondence, filing and record keeping etc.

Thus, the appointment of a secretary is considered essential in the present scenario.

### Origin of a Secretary

**Explain the origin of a Secretary.**  
- The word ‘Secretary’ has been derived from the Latin word ‘Secretarius’ which means confidential writer or officer or a person who is entrusted with secrets of his master/employer.
- In the Old Roman Empire, the officer looking after secretarial duties or doing secretarial job was called as a ‘Scribae’ which means professional letter writer or the one who maintains confidential records.
- Secretary has a reference even in the Ancient Indian History during the Mughal and Maratha Empire. They were known as ‘Amatya’, ‘Sachiva’ or ‘Chitnis’.
- The profession of a secretary is considered as one of the oldest professions. It is known to be as old as the human civilizations.
- According to Jacobson, in his book published, ‘The Manual of Secretarial Practice’, “the profession of a secretary is one of the oldest professions in the world and that wherever there was a man of action, there too was a man of pen to record his deeds”.
- The State Government and Central Government also have secretaries for various departments functioning under the control of ministers in the Sachivalaya.

### Changing Concept of Secretary

**Discuss the changing concept of a Secretary.**  
- In ancient times, a secretary was appointed by the King, Emperor or a person holding an important position in the society to look after their routine work. However, the work of a secretary was limited to writing letters, doing confidential work and providing advice, as and when required.
- In the modern times, due to expansion of business, the secretary is required to perform a number of functions and duties.
- The secretary is required to:
  - Possess knowledge relating to the recording of financial reports and statements,
  - Possess professional skills,
  - Maintain public relations,
  - Possess knowledge about various legal Acts and provisions which are applicable to the business organization etc.
- The secretary works as a backbone for the organizational structure.
- This resulted in the change of the concept of profession of a secretary from that of a personal secretary to an institutional secretary. Such changes led to the change in his duties from a clerical level to a ministerial level.

The changes in the concept of a secretary have resulted due to the following aspects:

[Mnemonic: FLIP The Plate]

i. **Financial Aspects:**
   - Every business organization strives hard to earn maximum profits. This has led to an increase in the number of financial transactions.
   - The business organization is required to prepare financial statements and reports.
   - For this, a secretary possessing the knowledge of recording financial transactions is required.

ii. **Legal Provisions:**
   - Every business organization is required to comply with all the statutory provisions of the Act under which it is registered.
   - Thus, the business organization needs a secretary possessing knowledge of the applicable Act and other Acts in order to ensure compliance of their provisions.

iii. **Increasing Size of Business:**
   - Due to industrial revolution and production in anticipation of demand, the scale of business has remarkably increased.
   - In order to carry out large business operations, the secretary is required to possess professional skills as well as knowledge about the concerned business.

iv. **Public Relations:**
   - Maximization of profits is the basic aim of every organization.
   - Developing relations with public ensures maximization of profits.
   - Here, the secretary helps in maintaining public relations and creating good image of business among the public through timely correspondence (such as letters, telephone, e-mails etc).

v. **Technical Aspect:**
   - In the modern business world, continuous innovations and rapid changes have been noticed.
   - Advanced machineries, instruments and methods are used to produce goods in large quantities.
   - Hence, the secretary is required to possess knowledge relating to modern techniques and methods such as manufacturing process, operational techniques, office automation, labour saving devices etc. in order to increase the efficiency of the organization.

vi. **Government Policies:**
   - The Secretary is considered as a Chief Executive Officer of the organization.
   - He is required to execute and implement the policies frames by Central and/or State Government from time to time.

**Definitions of Secretary**

**Define the term Secretary.**

- Secretary is a person who assists the management in achieving the objectives of the organization. He is entrusted with secrets and confidential matters of his master/employer. He records data for future reference and decision making. The secretary also performs routine functions such as managing office and office work, conducting meetings, co-ordinating departmental work, maintaining public relations and company image, conducting correspondence etc.

Different authorities have provided different definitions of a Secretary. They are as below:

- According to The Oxford Dictionary, a Secretary is, “a person whose work is to write for others, especially one who is employed to conduct correspondence, keep records and to...
Describe the features of a Secretary.

Each Secretary is a person who assists the management in achieving the objectives of the organization. The features of a Secretary are as follows:

**An Individual:**
- A secretary must be an individual or a living person.
- He must possess the qualities of the head as well as heart such as accuracy, tact, leadership, courtesy etc.
- He is appointed as Secretary in order to carry out secretarial duties.

**Qualifications:**
- Every secretary is required to possess sound educational qualifications as required by the organization or the prescribed Act.
- The secretary is supposed to carry out the work as per the guidelines and directions of the employer.
- He is expected to maintain utmost business secrecy as he is closely connected with the top level management.
- The secretary is entrusted with secrets and confidential matters of his master/employer/organization.

**Personal Secretary:**
- When a secretary is appointed by individuals such as ministers, doctors, lawyers, film actors etc. he is known as Personal Secretary.
- The Secretary is classified into two types on the basis of appointment:
  1. Personal Secretary
  2. Institutional Secretary

**Institutional Secretary:**
- Secretary is the person who deals with the general administration of an organization, particularly with clerical work such as correspondence, record-keeping and maintaining society or corporation or public body.
- The Secretary is a knowledgeable person who is entrusted with secretarial matters. He is also required to discharge administrative and ministerial work.

**Employee:**
- A secretary is appointed by the employer.
- It can be an employer-employee relation between the employer/organization and the secretary.

**Secretary:**
- The Secretary is appointed by the employer.
- The Secretary is entrusted with the duties of the prescribed Act, and the other ministerial or administrative duties.
- **Institutional Secretary:**
  When a secretary is appointed by institutions such as company, non-profit organizations, co-operative society, club etc., he is known as Institutional Secretary.

**Executor of Policies:**
The secretary is the chief executive officer of the organization and hence is required to execute and implement the various plans, policies and decisions of the management.

**Important of Secretary**

**Q.5. Explain the concept and importance of a Secretary.** [10]
Secretary is a person who assists the management in achieving the objectives of the organization.

**Concept of Secretary:**
Refer Q.2. [Only introductory paragraph is expected]

**Importance of a Secretary:**
Irrespective of the size of an organization, a secretary performs various important duties and functions. He performs routine administrative duties, keeps records, statutory books and accounts, meets visitors and maintains communication with interested parties. Thus, he has an important role to play in trading, industrial and commercial activities.

The importance of a secretary is as follows: [Mnemonic: All C²LEAR]

i. **Administrator:**
- The basic work of a secretary is to look into the routine office administration of the organization.
- Office administration includes documentation related to important issues, replying to official mails, answering phone calls, meeting visitors, arranging meetings etc.
- This in turn, facilitates the top level management i.e. president, vice-president, managing director etc. to concentrate on important matters such as framing policies, drawing plans, supervision on implementation of plans and overall control.
- This can be done only when the routine jobs are taken care of by the secretary.

ii. **Custodian of Secret Information:**
- The secretary acts as a confidential and a trustworthy person of the organization.
- The secretary conducts meetings as per the order/directions of the directors and also attends the meetings to assist the management and draft minutes.
- Since, the secretary attends the meeting, he is aware of all the confidential decisions taken.
- As a trusted employee, the secretary is expected to maintain utmost business secrecy as he is closely connected with the top level management.

iii. **Correspondent:**
- The secretary conducts timely correspondence with the members, directors, shareholders, banks, lenders, creditors, customers, registrar, insurance companies, government authorities etc.
- He communicates through the medium of letters, telephone, e-mails etc.
- He looks after the inward as well as the outward correspondence.
- The secretary is required to maintain public relations and create good image of the business among the public through proper correspondence. For this, he has to draft letters, e-mails etc. skillfully.

iv. **Legality:**
- One of the most important duties of the secretary is to comply with all the legal requirements on behalf of his organization.
- The secretary is required to maintain statutory books and registers in accordance with the provisions of applicable laws.
- Moreover, he has to file returns and statements with the government authorities within the stipulated time, as laid down by the applicable Act.

v. **Chief Executive Officer:**
- In a business organization, whether small, medium or large, the secretary is the channel or connecting link through which the management and staff communicate with each other.
- The secretary is required to establish an effective communication channel and coordinate between the management and staff at various levels.
- This facilitates smooth conduct of business operations and ensures continuity in work.
- Being a Chief Executive Officer, the secretary has to implement the policy decisions of the management.
- Also, he has to implement the Central and State Government policies applicable to the business organization from time to time.

vi. **Advisor:**
- The secretary is connected closely not only with the top level management but also with various aspects of the business organization.
- Thus, his views, suggestions and observations are taken into consideration by the management while taking crucial decisions and formulating plans and policies.
- The secretary performs the role of an advisor to the management and helps in taking correct and timely policy decisions.
- These policy decisions are often crucial to achieve and maintain growth of the organization.

vii. **Vital Role in Conducting Meetings:**
- It is the duty of the Secretary to arrange and conduct various meetings as per the directives of the Board of Directors.
- He has to adhere to all the legal provisions of conducting a meeting. The secretary has to perform all the necessary duties before, during and after the meeting.

### Multiple Choice Questions

Select the correct option from the options given below and rewrite the statements:

**[1 mark each]**

*1. The word ‘Secretary’ is derived from the Latin word ______ which means confidential writer.
   (A) Amatya  (B) Scribae  (C) Secretarius

2. Scribae means a professional ______.
   (A) artist  (B) planner  (C) letter writer

*3. In the old Roman Empire, the officer performing secretarial duties was called as ________.
   (A) Secretarius  (B) Sachiva  (C) Scribae

*4. In Ancient Indian History, the person doing secretarial work was known as ________.
   (A) Scribae  (B) Amatya  (C) Secretarius
*5. The State and Central Government also have secretaries for all departments functioning under the control of ministers in _______.
   (A) Stock Exchange   (B) Sachivalaya   (C) Capital Market

*6. Every business organization needs a secretary having knowledge of recording _______ transactions.
   (A) financial   (B) private   (C) illegal

7. A Secretary is considered as _______.
   (A) a Manager   (B) an Assistant Manager   (C) a Chief Executive Officer

8. A secretary maintains _______ relations through letters, e-mails, telephone etc.
   (A) public   (B) private   (C) personal

*9. A secretary is custodian of _______ information.
   (A) secret   (B) non-confidential   (C) personal

*10. A secretary is _______ of his organization.
    (A) an owner   (B) a chairman   (C) an employee

11. A secretary should be _______.
    (A) a partnership firm   (B) a corporate body   (C) an individual

12. The secretary acts as _______ between the management and staff of an organization.
    (A) an association   (B) a connecting link   (C) an institution

13. The secretary performs the role of _______.
    (A) an advisor   (B) a financial provider   (C) a director

**II.**

**Match the correct pairs:**

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<tbody>
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<td>a. Employee</td>
</tr>
<tr>
<td>ii. Scribae</td>
<td>b. French word</td>
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<td>iii. Chitnis</td>
<td>c. Statutory duty</td>
</tr>
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<td></td>
<td>h. Moral Duty</td>
</tr>
<tr>
<td></td>
<td>i. Latin word</td>
</tr>
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<td></td>
<td>j. Institution</td>
</tr>
</tbody>
</table>

Ans: (i – i), (ii – e), (iii – g), (iv – a), (v – c).

** III.**

Write a word or a term or a phrase which can substitute each of the following statements:

1. Person appointed to look after the day-to-day business matters.

2. A person doing secretarial work in the Ancient Indian History.

3. An officer performing secretarial duties in Roman Empire.

4. A person who is entrusted with secrets and confidential matters.

5. The Latin word which means a person who is entrusted with secrets of his master.

6. A secretary appointed for an Individual.
**IV.**

State with reasons, whether the following statements are True or False:  [5 marks each]

**1.** The word ‘Secretary’ is derived from Latin word ‘Scribae’.

**Ans:** This statement is **FALSE**. ['Secretary’ is derived from Latin word ‘Secretarius’].

**Reasons:**
- The word ‘Secretary’ has been derived from the Latin word ‘Secretarius’ which means confidential writer or a person who is entrusted with secrets of his master/employer. Therefore, the secretary is said to be the custodian of secret information of his master/employer.
- He records the data for future reference and decision making. Moreover, the secretary assists his master/employer in achieving his objectives.
- On the other hand, in the old Roman Empire, the person who carries out secretarial work is known as ‘Scribae’. Scribae refers to a professional letter writer or the one who maintains confidential records.

Thus, the word ‘Secretary’ is derived from the Latin word ‘Secretarius’ and not ‘Scribae’.

**2.** A Secretary must have knowledge of modern techniques and methods.

**Ans:** This statement is **TRUE**.

**Reasons:**
- During the olden days, the role of a secretary was limited to routine work like providing advice, doing confidential work and writing letters.
- However, rapid changes and development over the years in the field of science and technology have been noticed. Also, the use of computers in every organization has become inevitable. Every organization uses computers to store, record and analyze data. Hence, the secretary is required to be well versed with computers in order to facilitate the regular office work.
- Also, in the modern business world, continuous innovations and changes take place. Advanced machineries, instruments and methods are being used to produce goods in large quantities.
- Hence, the secretary must possess knowledge of modern techniques and methods in order to manage the affairs of the business efficiently.
- To improve and enhance the efficiency of the organization, the secretary must keep himself constantly updated and acquainted with the use of modern techniques and methods such as manufacturing processes, operational techniques, office automation, labour saving devices etc.

Thus, a secretary is required to have knowledge of modern techniques and methods.

**3.** A secretary must be an individual.

**Ans:** This statement is **TRUE**.

**Reasons:**
- Secretary is a person who assists the management in achieving the objectives of the organization.
- He is an individual appointed by another individual/organization in order to perform various routine jobs and assist the person in authority to achieve the objectives.
- Also, in the modern business world, the secretary is required to perform a number of functions such as managing the office and office work, conducting correspondence,
conducting meetings, co-ordinating departmental work, maintaining public relations and company image.
- Usually, secretary is appointed by busy individuals, companies, co-operative societies, a government department or non-profit organizations. The secretary relieves the burden of the management and enables them to concentrate more on other important issues relating to business plans and policies, execution of policies and overall control.
- For this purpose, the secretary must be an individual i.e. a living person. No group of people or corporate body or any institution or a partnership firm can be appointed as a Secretary. Only a person with body, soul, creativity, analytical ability and decision-making power can be appointed as a secretary who can perform the secretarial duties.

Thus, a secretary must be an individual.

4. A secretary is an employee of his organization.
   Ans: This statement is TRUE.
   Reasons:
   - Secretary is a person who assists the management in achieving the objectives of the organization.
   - He is an individual who assists the management in carrying out the operations of the business smoothly and efficiently. Along with the routine functions, the secretary performs a number of other functions too.
   - These functions include managing the office and office work, conducting correspondence, conducting meetings, co-ordinating departmental work, maintaining public relations and company image.
   - The appointment of a secretary depends upon the laws governing the organization. The appointment may be full time or part time. Also, the secretary is not a member of the organization.
   - The secretary is a paid employee of the organization wherein he is paid salary on the terms as agreed. As per the law though, Secretary is a senior official and occupies a pre-dominant position in the business. He is not given any independent powers or authorities. He merely assists the management in achieving the objectives.
   - He works as per the instructions and directives given by the top level management. He acts within the powers delegated to him by the managing body. The secretary assists the management in making decisions but has no power of decision making.

Thus, the secretary is an employee who executes the decisions of the management of the organization.

5. A secretary is not responsible for compliance with legal requirements on behalf of his organization.
   Ans: This statement is FALSE. [A secretary is responsible for compliance with legal requirements on behalf of his organization]
   Reasons:
   - Secretary is a person who assists the management in achieving the objectives of the organization.
   - He works as a legal advisor and executor of the organization’s policies. The secretary is responsible for compliance with the legal provisions that govern the organization.
   - He is required to perform a number of statutory functions. Failure to hold a Statutory Meeting or failure to file the Statutory Report with the Registrar of Companies within the stipulated period holds the Secretary guilty and liable for penalty.
   - The secretary has to maintain statutory books and registers in accordance with the provisions of the applicable laws, file returns and statements with the government authorities within the stipulated time, as laid down by the applicable act.

Thus, a secretary is responsible for compliance with legal requirements on behalf of his organization.
**Q.1.** Write short notes on:

i. **Changing concept of Secretary.**
   Ans: Refer Q.2.

ii. **Features of Secretary.**
   Ans: Refer Q.4.

iii. **Importance of Secretary.**
    Ans: Refer Q.5.

### QUICK RECAP

#### Origin of a Secretary

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<td>Scribae</td>
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<td>He is the confidential writer/officer/a person who is entrusted with secrets of his master/employer</td>
<td>He is the professional letter writer or the one who maintains confidential records.</td>
<td>ii. Sachiva</td>
</tr>
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<td></td>
<td></td>
<td>iii. Chitnis</td>
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#### Changing concept of a Secretary

**[Mnemonic: FLIP The Plate]**

i. Financial Aspects
ii. Legal Provisions
iii. Increasing Size of Business
iv. Public Relations
v. Technical Aspect
vi. Government Policies

#### Secretary

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