☐ BASIC INFO

Financial Year: 2023-24

Age: 29

Tax Regime: New Regime

INCOME DETAILS

Salary Income:

- Gross Annual Salary: ₹10,00,000

- Basic: ₹5,00,000

- HRA: ₹2,00,000

- Special Allowances: ₹2,00,000

- Bonus: ₹1,00,000

- Form 16 Provided: Yes

- Receives HRA and lives in a rented house: Yes (Monthly Rent: ₹15,000)

Other Income:

- Interest from Savings: ₹12,000

- Fixed Deposit Interest: ₹18,000

- Rental Income: ₹1,20,000 (Property Tax Paid: ₹10,000)

- Capital Gains: ₹35,000 (from Mutual Funds)

- Freelance Income: ₹50,000

- Dividend Income: ₹8,000

DEDUCTIONS & EXEMPTIONS CLAIMED (Old Regime only, but included for completeness)

Section 80C:

- LIC Premium: ₹20,000

- PPF: ₹50,000

- ELSS: ₹30,000

- Home Loan Principal: ₹40,000

- Tuition Fee: ₹10,000

Section 80D:

- Health Insurance (Self + Family): ₹25,000

Section 24(b):

- Home Loan Interest: ₹1,50,000

Other Deductions:

- Education Loan Interest (80E): ₹30,000

- Donations (80G): ₹5,000

- Savings Interest (80TTA): ₹10,000

TAXES ALREADY PAID

- TDS from Form 16: ₹45,000

- Advance Tax Paid: ₹10,000

- Self-Assessment Tax Paid: ₹5,000

Additional:

- Landlord: Yes (Rental Property: ₹10,000/month)

- Foreign Income: No

- Foreign Assets: No

- Business: NO