

Investment Declaration Form FY 2013 - 2014



Employee ID: MAHAJV11

Employee Name: VINAY MAHAJAN

PAN: AJUPM3852H

I furnish the below mentioned information to compute my Income Tax liability for the F.Y 2013-2014 (1st Apr 2013 to 31st March 2014). During this current financial year I will be making the following investments/ payments towards the declared investments. Please note that the amount given below do not include deductions made from my salary towards PF, VPF, PT, and LIC if any.

Investments under Section 80 C:

Sl.	Type of Investment	Amount (in Rs.)	Proof Required Later
01.	Life Insurance Premium Paid for Self/Spouse/Children (Excluding the deductions through Salary)	30142	Copy of Premium Receipt
02.	Public Provident Fund subscriptions for Self/Spouse/Children		Deposit Receipt for PPF Account(s)
03.	NSC (Only in the name of self)		Copy of NSC Certificate
04.	NSC Accrued Interest		Copy of NSC Certificate
05.	Unit Linked Insurance Plan (ULIP)		Acknowledgement Copy
06.	Principal Repayment on Housing Loan	118926	Certificate of Principal Repayment from the Financial Institution
07.	Tax Saving Bonds		Copy of Bond/Acknowledgement Copy of Payment
08.	Tax Saving Mutual Funds		Proof of Investment made
09.	Children Education Expenses Number of Children: 1	70000	Proof of expenses incurred for a maximum of 2 children (only School Fees, excluding Donations/Building Fund)
10.	Tax Saving Fixed Deposits (Minimum lock-in-period of 5 years)		Proof of Investment
11.	Senior Citizen Savings Scheme (Applicable to employees who are Sr citizen)		Proof of Investment
12.	Post Office Time Deposits (Minimum lock-in-period of 5 years)		Proof of Investment
13.	NPS (New Pension Scheme)		Proof of Investment

Other Investment Declarations:

Sl.	Section	Remarks	Amount (in Rs.)	Proof Required Later
01.	Section 80 CCC Pension Scheme (Section 80 CCC)	Investments made in Jeevan Suraksha of LIC or any other insurer.	270570	Copy of Premium Paid Receipt
02.	Section 80 CCG Rajiv Gandhi Equity Saving Scheme (RGESS)	<ul style="list-style-type: none"> Deduction is available to a resident individual, if his gross total income does not exceed 12 lakh. The assessee is a new retail investor. The investment is locked-in for a period of 3 years. <p>The maximum Investment permissible under the Scheme is Rs.50,000.</p> <p>The amount of deduction is 50% of amount invested in equity shares. However, the amount of deduction under this section cannot be more than Rs.25000.</p>		Copy of investment certificate from the financial institution / Demat Account
03.	Section 80 D Mediclaime Insurance Premium	<p>Premium should be paid by Cheque only to avail deduction.</p> <p>Medical Insurance Premium is exempt upto Rs.15,000/- per year for self, spouse and dependent children.</p> <p>An additional Rs.15,000/- is exempt towards premium for parents (even if they are not dependent).</p> <p>If the parent(s) are above 65 years of age, an extra Rs.5,000/- can be claimed.</p> <p>Preventive Health Checkup of self, spouse, dependent children or parents to the extent of Rs.5,000/- (Part of overall above limits).</p>		Copy of Premium Paid Receipt
04.	Section 80 E Education Loan Interest Repayment	Repayment of Education Loan Interest for self and dependant.		Certificate from Lender
05.	Section 80 DD Maintenance/Medical Treatment of Handicapped Dependant	NONE	0	Self-Declaration of expenditure incurred and Certificate from Government Doctor
		<p>NO - loan taken from financial institution on or after 1st APRIL 2013</p> <p>NO - of loan sanctioned for the residential property does not exceed Rs 25 lakhs</p>		

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06.	Section 80EE Interest on Housing Loan	NO - of the residential property does not exceed Rs 40 lakhs and possession taken before 31st March 2014 NO - residential property was owned on the Date of Sanction of Loan Maximum amount permissible under the scheme is Rs. 1 lakh		Self declaration and certificate from financial institution.
07.	Section 80 U Deduction in respect of person with disability	Deduction is allowed to a person suffering from a permanent physical disability Disability Level: NONE		Certificate from Government Doctor

House Rent Details:

Particulars		Proof Required Later
Month	Amount City	
April		
May		
June		
July		Rent Receipts / Copy of Rental Agreement
August		
September		If the Annual Rent paid by the employee exceeds Rs.2,00,000 per annum, it is mandatory for the employee to report the PAN Number of the Landlord.
October		
November		In case the landlord does not have a PAN, a declaration to this effect from the Landlord, along with the Complete Name and Address of the Landlord should be filed by the employee.
December		
January		
February		
March		

Income/Loss from House Property:

No of Property : 1

S.No.	Property Type	Address of the property	Date of Possession	Annual Rent Received (Mandatory for let out property)	Annual Municipal tax paid	30% Rebate for Repairs and Maintenance-For Let out property	Interest paid during current year excluding the amount claimed u/s 80EE, if any	Net Income or Loss
1	Self Occupied	L6/201 Lok Kedar, Jata Shankar Dosa Road, Mulund (w), Mumbai 400080	12/03/2012	0	0	0	719718	-719718

DECLARATION:

I confirm that:

- The amount of investments/payments referred above is/will be paid out of the income chargeable to tax
- I am aware that this declarations is to facilitate appropriate tax deductions at source for the current year and I shall ensure to send all receipts/documents as and when demanded as proof if the payments made
- I will not terminate any insurance contract within 2 years of its commencement (If applicable)
- I will not terminate participation in Unit Linked insurance plan details of which has been given above(If applicable)
- I will not transfer my House Property referred above before the expiry of five years from the end of the financial year in which possession of the such house property is obtained by me((If applicable)
- I will not terminate term deposits invested in Scheduled Bank before 5 years ((If applicable)
- I also undertake to inform the company in the event of occurrence of any events mentioned (e) and or (f) above within one week of happening of the events and will provide the complete details of the deductions claimed in any earlier years to facilitate the Company to disallow any deductions claimed by me ((If applicable)

I hereby declare that I will make above payments during the Financial Year 2013-2014 and I shall be held liable for any liability arising out of any discrepancies in the above declaration. I also agree that I shall make necessary arrangements to submit the proofs as and when demanded as per the guidelines.

Date of Submission : 17-Jun-2013

Name of the Associate : VINAY MAHAJAN