

## CHECKLIST FOR INVESTMENT DOCUMENTS

### **Telephone:-**

<b>Tax Benefit</b>	4,500/- Per Quarterly
<b>Documents Needs to be upload</b>	Scan copy of Original Monthly Telephone Bills.
<b>Documents needs to be submitted to Accounts personal</b>	Original / Photo copy of Monthly Telephone Bills.
<b>Type of Bill</b>	Only Postpaid Connection.
<b>Name on Bill</b>	Self or Spouse
<b>No. Of Bills</b>	One Mobile No.'s bill in a month.
<b>Bill Month</b>	Bill generation date and any part of the usages period should fall in that Month.
<b>Print out format</b>	Portrait format only.
<b>Main Points</b>	Name, Bill Period, Current month charge and Telephone number

### **Fuel (Petrol/Diesel):-**

<b>Tax Benefit</b>	6,000/- Per Quarterly (Two Wheeler), 9,000 /- Per Quarterly (Four Wheeler)
<b>Documents Needs to be upload</b>	Scan copy of Original Fuel Bills.
<b>Documents needs to be submitted to Accounts personal</b>	Original Fuel Bills.
<b>Type of Bill</b>	Fuel Bill (Bank receipts are not accepted).
<b>Name on Bill / RC</b>	Self / Spouse / Children (2) / Dependent Parents.
<b>Main Points</b>	Amount, Date & Fuel Type (Diesel/Petrol/CNG).

### **House Rent Allowance:-**

- Rent Agreement (Mandatory) – Valid for Apr'18 to March'19.

	<b>Payment Per Month</b>		
<b>Name of Documents</b>	<b>Upto Rs. 5000.</b>	<b>More than Rs. 5000 but less than Rs. 8333.</b>	<b>More Than Rs. 8333.</b>
<b>Copy of Rent agreement</b>	√	√	√
<b>Payment Slip</b>	√	√	√
<b>Payment Slip with the Revenue Stamp</b>	×	√	√
<b>Copy of Landlord's PAN Card.</b>	×	×	√

Note- Only rent part (Excluding Water charge, Electricity charge and Etc.) is eligible for calculation.

### Leave Travel Allowance:-

Tax Benefit	36,000/- Per Annum
Documents Needs to be upload	Scan copy of Travel Ticket.
Documents needs to be submitted to Accounts personal	Original Ticket.
Type of Bill	Travel Ticket.
Mode of Journey	Railways / Air
Name on Bill	Self / Spouse / Children (2)
No. of Journey	One
Period of Bill	Current Financial Year.
Print out format	Portrait format only.
Journey cycle	Travel Cycle should be complete. Like Visit → Delhi to Goa (Go) Goa to Delhi (Return).
Main Points	Name, Amount & Date.

### PPF/Pension -80C:-

Tax Benefit	Amount paid {Part of 80C (Max. 1,50,000)}
Documents Needs to be upload	1. Bank Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that account is a PPF account.
Documents needs to be submitted to Accounts personal	1. Bank Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that account is a PPF account.
Scope	Self only.
Period of Payment	Current Financial Year.
Print out format	Portrait format only.
Main Points	Name, Amount paid in the Current Financial Year & Account No..

### Life Insurance Course -80C:-

Tax Benefit	Premium paid {Part of 80C (Max. 1,50,000)}
Documents Needs to be upload	Payment Slip or Payment Certificate
Documents needs to be submitted to Accounts personal	Payment Slip or Payment Certificate
Scope	Self / Spouse / Children / Dependent Parents.
Period of Payment	Current Financial Year.
Print out format	Portrait format only.
Main Points	Name, Amount paid in the current financial year and account no.

### Tuition Fee- 80C:-

Tax Benefit	Max. 150000 [Part of 80C (Max. 1,50,000)]
Documents Needs to be upload	Scan copy of Original Fee Receipt.
Documents needs to be submitted to Accounts personal	Photo copy of Original Fee Receipt.
Type of Bill	Child Tuition Fee Receipt.
Name on Bill	Children
No. Of Child	Maximum two child.
Period of Bill	Current Financial Year.
Print out format	Portrait format only.
Main Points	Name, Amount & Date.

### **Home Loan Principle- 80C:-**

<b>Tax Benefit</b>	<b>Principle paid { Part of 80 C (Max. 1,50,000)}</b>
<b>Documents Needs to be upload</b>	Scan copy of original Loan certificate. - If don't have loan certificate 1. Bank loan Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that loan is a home loan. (in a common proof)
<b>Documents needs to be submitted to Accounts personal</b>	Photo copy of original Loan certificate. - If don't have loan certificate 1. Bank loan Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that loan is a home loan. (in a common proof)
<b>Loan for</b>	Self
<b>Period of Payment</b>	Current Financial Year.
<b>Print out format</b>	Portrait format only.
<b>Main Points</b>	Name, Loan Type, Amount of Principle Paid.

### **Home loan Interest- Section-24:-**

<b>Tax Benefit</b>	<b>Interest paid in the current year + 1/5 of the interest paid before possession (till 5 years from the possession)</b>
<b>Documents Needs to be upload</b>	1. Scan copy of Possession Certificate. 2. Scan copy of original Loan certificate. - If don't have loan certificate 1. Bank loan Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that loan is a home loan. (in a common proof)
<b>Documents needs to be submitted to Accounts personal</b>	1. Scan copy of Possession Certificate. 2. Scan copy of original Loan certificate. - If don't have loan certificate 3. Bank loan Statement. (Highlighted Statement) 4. Copy of first page or the profile – where it is mentioned that loan is a home loan. (in a common proof)
<b>Loan for</b>	Self
<b>Period of Payment</b>	Current Financial Year.
<b>Print out format</b>	Portrait format only.
<b>Main Points</b>	Name, Loan Type, Amount of Interest Paid.

### **Health Policy 80D:-**

<b>Tax Benefit</b>	<b>Self + Spouse + Children – 25,000 &amp; Health Policy of Parents – 25,000/50,000</b>
<b>Documents Needs to be upload</b>	Certificate of Health Policy.
<b>Documents needs to be submitted to Accounts personal</b>	Certificate of Health Policy.
<b>Scope</b>	Self / Spouse / Children / Dependent Parents.
<b>Period of Payment</b>	Current Financial Year.
<b>Print out format</b>	Portrait format only.
<b>Main Points</b>	Name, Amount paid in the Current Financial Year & Account No..

## 80E Higher Education Loan (Full Time Course):-

Tax Benefit	Interest paid.
<b>Documents Needs to be upload</b>	Scan copy of original Loan certificate. - If don't have loan certificate 1. Bank loan Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that loan is an education loan. (in a common proof)
<b>Documents needs to be submitted to Accounts personal</b>	Photo copy of original Loan certificate. - If don't have loan certificate 1. Bank loan Statement. (Highlighted Statement) 2. Copy of first page or the profile – where it is mentioned that loan is an education loan. (in a common proof)
<b>Loan for</b>	Self.
<b>Period of Payment</b>	Current financial year.
<b>Print out format</b>	Portrait format only.
<b>Main Points</b>	Name, loan type, Amount of Interest Paid.

## IT Sector 80C – 80E:-

- If the member has any other investment which falling between sections 80 C to 80 E will be considered with the valid proof.

### Note-

- If you have multiple small bills of any section kindly upload then secretly each and submit to the accounts department by pasting on a paper as shown in the below picture.

### Multiple bill Paste on Paper like this



- Accounts team will be ask for any other information/documents during the verification of your Investment Proof. If any Investment Proof/documents found wrong as per rule/regulation of IT Act, Accounts Team will disallow the documents.

### If any information:-

Contact us @ Extn → 4170/3010

Or email id → in\_accounts@chetu.com.