

ABC INDIA PVT.LTD

INVESTMENT DECLARATION FORM FOR THE YEAR 2016-2017

Employee Name		Employee ID	
Gender		DOJ	
PAN		No. of children	

Deduction Under Section 10

HRA	Period From (DD/MMM/YYYY)	Period To (DD/MMM/YYYY)	Location	Rent (Per Month)*
	If change during the FY			
	If change during the FY			
	Landlord PAN no must required if monthly rent exceed Rs. 8333			

Deduction Under Chapter VI A

Item	Particulars	Max Limit	Value of Proof Attached
	Detail of Medical bill	15000	
Deduction Under Chapter VI A	Sec 80D - Medical Insurance Premium:- For an individual assessee, spouse & children. Max limit is Rs. 25000/- , (If the policy covers dependant parents then an additional Rs.25000 is allowed as deduction and in case of a senior citizen then deduction is Rs 30000.	55,000.00	
	Sec 80DD - Medical treatment/Insurance of handicapped dependant (if Disability is >80% then Rs.125000/-)	125,000.00	
	Sec 80E - Repayment of Loan Interest for higher education (only Interest)*	No Limit	
	Sec 80U - Handicapped Individuals (if Disability is >80% then Rs.125000/-)	125,000.00	
	Sec 80DDB - Medical treatment for Specified diseased.	80,000.00	

Deduction under Section 80C	Sec 80CCC - Contribution to Pension Fund (Annuity)	1,50,000.00	
	Life Insurance Premium (Per Annum Amount)	1,50,000.00	
	Fixed Deposit with Scheduled bank with term not less 5 than years	1,50,000.00	
	Public Provident Fund	1,50,000.00	
	Deposit in Post Office Savings Scheme	1,50,000.00	
	ULIP of UTI/LIC	1,50,000.00	
	Housing Loan - Principal Repayment	1,50,000.00	
	Mutual Funds	1,50,000.00	
	Children Education Tuition Fees - restricted to a max of 2 children	1,50,000.00	
	National Pension Scheme	2,00,000.00	
	Equity Linked Saving Scheme (ELSS)	1,50,000.00	
	Deposit in NSC	1,50,000.00	
	NSC Interest (The same will be considered as Other Income as well)*		
Others (please specify) -	1,50,000.00		
Deduction under Section 24	Interest on Housing Loan (Self Occupied)	200,000.00	
	Interest/Loss on Housing Loan (Let Out Property)	No Limit	
	Interest if the loan is taken before 01/04/99	30,000.00	

Previous Employment Salary (Salary earned from 01/04/14 till date of joining)	If yes, Form 16 from previous employer or Form 12 B with tax computation statement to be enclosed		
	Previous Employer Taxable income		
	PROFESSIONAL TAX deducted by the Previous Employer		-
	PROVIDENT FUND deducted by the Previous Employer		
	INCOME TAX deducted by the Previous Employer		

Income other than salary income	I, (name of the assessee), do declare that what is stated under this is true to the best of my information and belief.		
Control Total (Please total the figures entered in 2+3+4+5+6) (Mandatory)			-

Declaration

- I hereby declare that the information given above is correct and true in all respects.
- I also undertake to indemnify the company for any loss/liability that may arise in the event of above information being incorrect.
- I understand that the eligibility to deductions based on investment / expenditure under Chapter VIA estimated projections which, I will confirm with documentary evidence before stipulated dates communicated to me by my employer.
- My claim for exemption of HRA (either full or part) is based on the actual rent paid by me
- I understand that no refund of excess tax, if any, deducted from my salary will be made to me by the Company under any circumstances and that any such refund will have to be claimed by me in my Tax Return, to be filed by me with the Income-tax authorities.
- I hereby undertake, agree and confirm that I shall be fully responsible for any income tax liability that may arise if this declaration is found incorrect in any manner.

Date:
Place:

Signature of the Employee