

INVESTMENT PROOFS FOR THE FINANCIAL YEAR 20 - 20 (A.Y. 20 -)

Company Name: _____

To,
The HR Department

I am furnishing following particulars for your record and doing the needful:

1. Employees Code No. : _____
2. Employee Name : _____
3. PAN No./ Ward & Circle No. : _____
(Copy of PAN No. is enclosed if not submitted in previous year.)

4. Contact No. (Mandatory) : Office No.-----Extn.-----
Mobile No.-----

INVESTMENT PLAN

I hereby agree and undertake to invest / contribute following sums during the financial year under the different heads which qualify for tax rebate/deduction under the provisions of Income Tax Act, 1961.

Sr. No.	PARTICULARS (Total Limit is 1.5 Lac including EPF & VPF Contribution)	Max Limit	AMOUNT
1.	Public Provident Fund (Self, Spouse & Children)	1.5 Lac	
2.	Life Insurance Premium (Self, Spouse & Children)	1 Lac	
3.	Pension Fund Plan u/s. 80ccc (Self)	1 Lac	
4.	National Saving Certificates (Self & Spouse/ Children followed by Assesses First Name)- New Purchase	1 Lac	
5.	Accrued NSC Interest (As per enclosed copies)	1 Lac	
6.	Unit Linked Insurance Plan (Self)	1 Lac	
7.	Mutual Funds (Self)	1 Lac	
8.	Infrastructure Bonds (Self)	1 Lac	
9.	Repayment of Borrowed Housing Loan (Principal Amount) Plus Registration & Stamp Duty (If incurred during the Financial Year)	1 Lac	
10.	Tuition Fees (For Two Children Except Nursery Class) (Private Tuition, Term Fees, Activity, Donation etc. Not Applicable)	1 Lac	
11.	Long Term Fixed Deposit with Bank. .(Min 60 Months)	1 Lac	
	TOTAL		

Medical Insurance Premium for myself and or my dependent family members
U/s. 80 D (Maximum Exemption = 25000/-) Rs.-----

Medical Insurance Premium paid for Dependent Parents u/s. 80 D (Max = 30000/-): Rs.-----

Interest On Education Loan Availed For Higher Education u/s. 80E (Self/ Children): Rs.-----

Self / Dependent Permanent Disability Exemption u/s 80U / 80DD Rs.-----

Preventive Health Check Mediciam (Max 5000/-) Rs.-----

Contd.2

ANNEXURE I- (Declaration u/s. 10 (13A))

I, Mr/ Ms. -----hereby state as follows:

1. I have occupied the premises at -----

on rental basis for my own residence and occupation.
2. I am paying monthly rent of Rs. ----- from the month-----and will continue till the month -----
3. I do not have any ownership or other financial interest in the premises which I am occupying for my residence.
4. I hereby agree to produce the money receipt of house rent paid by me to the owner of the premises on or before the end of financial year or as per your requirement.

EXEMPTION CRITERIA

1. Actual HRA received by you.
 2. 50% of Basic Salary in Town (Mumbai, Delhi, Calcutta and Chennai etc.)
 2. 40% of Basic Salary in villages or other places.
 3. Actual rent paid minus 10% of Basic Salary
- Which ever is less**

Signature of Employees.

ANNEXURE II – (Particulars of Income from Other Sources for the year ending 31st March, 2011.)

Sr. No.	PARTICULARS	AMOUNT
1.	Income from House Property	
2.	Profit and gains of Business or Profession	
3.	Capital Gain	
4.	Interest on Saving A/c. etc.	
5.	Interest on Borrowing Housing Loan (Maximum Limit= 2 Lacs) (Possession of Flat is mandatory during FY- Please enclose the Possession Letter)	
6.	Tax Deducted at Source (enclosed certificates issued u/s. 203)	

Signature of Employees.

Housing Loan : I have availed housing loan as per the following details given below:

Financial Institution : -----

Loan Sanction Date : -----

Possession Date : -----

VERIFICATION

I, ----- do hereby declare that, what is stated above is true the best of my information and brief. I understand that the employer is allowing me tax concession pursuant to the provision of Income Tax Act, 1961, based on this declaration which I hereby acknowledge and take note of .Any liability towards tax deduction, which may occur on the employer due to my mistreatment or wrong information, shall be solely at my risk and consequence. I hereby agree to indemnify the employer against any recovery or penal action if intimated by Income Tax department in this regards.

PLACE : -----

DATE : -----

SIGNATURE OF EMPLOYEES