

MEMO NO. 2

Dated: 01/04/2023



UNIVERSITY OF CALCUTTA

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AUDIT & ACCOUNTS DEPARTMENT, INCOME TAX CELL, 3RD FLOOR, CENTENARY BUILDING,

87/1 COLLEGE STREET, KOLKATA- 700073. Dial: 033-2241 0071 EXT. NO.: 433 Email: tdscell.cu@gmail.com

**DECLARATION FOR PROPOSED INCOME TAX SAVINGS INVESTMENTS AND OTHER INFORMATION
FOR THE FINANCIAL YEAR 2023-24.**

Pension Code: **PN** _____ Name: _____ PAN: _____

Date of Birth: ____ / ____ / ____ Mobile No.: _____ Pension Effect From : _____

Basic Pension: ₹ _____

Residential Address: _____

E-mail Address: _____ (in block letter) Aadhaar Card No.: _____

(Attach photocopy of Aadhaar card if not already submitted)

Option for Tax Computation method: Old regime / New Regime (please tick)

* In case one chosen the New Regime method, there is no need to fill the investment part of the rest of the form

Proposal of Investments for the F.Y. 2023-24 and other information: _____

1. Rent payable as tenant: _____ per annum

(Attachment of original Rent Bill for any one month of FY 2023-24 and photocopies of PAN Card of the Landlord are mandatory, if annual payable rent is **more than One Lakh** attach attested photocopies of agreement between Landlord and Tenant too)

2. National Savings Certificate: ₹ _____ 3. Interest from National Savings Certificate: ₹ _____

4. Recovery of H.B.L. by **Other Authorised Institution**: a) Interest ₹ _____ b) Principal ₹ _____

H.B.L. denotes House Building Loan [Max. deduction .for H.B.L Int. for const./new purchase. of one self-occupied house property is Rs.2 Lakh (u/s.24) only]

- *** 1.Please mention only Interest amount in case of Renovation/Alteration of Self-occupied house property/properties.
2. In case of co-borrowing, benefit will be proportionately distributed among all the co-borrowers unless declaration of other co-borrowers denouncing the benefit is submitted.
3. PAN of Loaner must be mentioned in the house building loan repayment certificate.

5. Interest from Savings Account(s): ₹ _____

6. Interest from any other source (Except Sl.No.3 & 5): ₹ _____

7. Income from other source (except Sl.No. 3, 5 and 6) ₹ _____

***Sl.No.3, 5, 6 and 7 are optional.

8. L.I.C. Premium: ₹ _____

9. P. P. F.: ₹ _____

10. P. L. I. Premium: ₹ _____

11. ULIP Premium: ₹ _____ 12. E.L.S.S.: ₹ _____

13. Tax Savings Term Deposit: ₹ _____

14. Tuition Fees ₹ _____ (allowable for Maximum Two dependent children)

[Please see overleaf]

15. L.I.C. Premium for Pension Fund: ₹ _____

16. Sukanya Samriddhi Yojana for Girl Child ₹ _____

17. Any other Investment (**Please Specify**) ₹ _____

N.B.: Maximum exemption limit 150000/- for Sl.No.2 to 18 except recovery of interest on H.B.Loan and Sl.No. 5 to 7

18. National Pension Scheme (NPS): ₹ _____ **(maximum eligible Exemption Limit 50000/-) [U/S 80CCD(1B)]**

19. Premium for Medical Insurance (**other than C.U.G.M.I.S.**): (a) Self ₹ _____ (b) Parents ₹ _____ (U/S80D)

20. Expenditure for disabled dependent: ₹ _____ **Attachment of Disability Certificate is mandatory.(U/S80DD)**

21. Expenditure for Special Ailment of Self/Dependent: ₹ _____ **Attachment of Certificate is mandatory.(U/S80DDB)(rule 11DD of Income Tax Rules)**

22. Repayment of Interest on Higher Education Loan: ₹ _____ (U/S 80E)

23. Donation (U/S 80G) : ₹ _____(U/S 80G)

24. Deduction for self-disability: ₹ _____ **Attachment of Disability Certificate is mandatory.(U/S 80U)**

25. Additional Deduction on interest of Housing Loan (U/S 80EE/ 80EEA: ₹ _____(Allowable as per IT rules)

***Tuition Fees, Medical Insurance Premium and Life Insurance Premium will be allowed as per IT Rules.**

DECLARATION:

I the undersigned declare that I am responsible to produce the relevant documentary evidences in support of my above stated income tax saving proposals in time, as and when it is asked for by the D.D.O. of University of Calcutta. If I fail to produce the relevant documentary evidences in support of my income tax saving proposals, and as a result any income tax liability is arisen, I shall have no objection to the recovery of all such income tax liability along with interest by the D.D.O. of University of Calcutta form my monthly pension at a time.

Full Signature: _____

Dated: _____

LAST DATE OF SUBMISSION: 31.05.2023
Submitted proposal can be amended any time within 01.06.2023 to 31.12.2023