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| **Anticipatory Income Tax Statement for the Financial Year 2023-24 (Assessment Year-2024-25)** | | | |  |  |  |  |  |  |  |
| **Name of Employee:** | |  | |  |  |  |  |  |  |  |
| **Designation:** | |  | |  |  |  |  |  |  |  |
| **PAN:** | |  | |  |  |  |  |  |  |  |
| **Office:** | |  | |  |  |  |  |  |  |  |
| **Category: Individual (Age: below 60 years)** | |  | |  |  |  |  |  |  |  |
| **Income Tax Slab: OLD Regime** | |  | |  |  |  |  |  |  |  |
| **1** | **a** | **to be furnished by the employees / officers whose income exceeds Rs. 2,50,000/-** | |  |  |  |  |  |  |  |
| **Gross Salary / Pension for the month : (includes Basic Pay, DA, HRA, CCA, Interim Relief, OT Allowance,Deputation Allowance, Medical Allowance, etc.)** | |  |  |  |  |  |  |  |
| **March - 2023** |  |  |  |  |  |  |  |  |
| **April - 2023** |  |  |  |  |  |  |  |  |
| **May - 2023** |  |  |  |  |  |  |  |  |
| **June - 2023** |  |  |  |  |  |  |  |  |
| **July - 2023** |  |  |  |  |  |  |  |  |
| **August - 2023** |  |  |  |  |  |  |  |  |
| **September - 2023** |  |  |  |  |  |  |  |  |
| **October - 2023** |  |  |  |  |  |  |  |  |
| **November 2023** |  |  |  |  |  |  |  |  |
| **December - 2023** |  |  |  |  |  |  |  |  |
| **January -2024** |  |  |  |  |  |  |  |  |
| **February -2024** |  |  |  |  |  |  |  |  |
| **b** | **Leave Surrender** |  |  |  |  |  |  |  |  |
| **c** | **Festival Allowance / Bonus / Ex-gratia and Incentive** |  |  |  |  |  |  |  |  |
| **d** | **Pay Revision Arrears, DA Arrears, Other Arrears, Deferred Payment** |  |  |  |  |  |  |  |  |
| **e** | **Total Salary Income (a+b+c+d)** |  |  |  |  |  |  |  |  |
| **2** | **Deduct: HRA in the case of persons who actually incur expenditure by way of Rent** | |  |  |  |  |  |  |  |  |
| **i** | **Actual HRA Received the year** |  |  |  |  |  |  |  |  |
| **ii** | **Actual rent paid in excess of 1/10 th of the salary (Basic Pay + DA)** |  |  |  |  |  |  |  |  |
| **iii** | **40% of the salary (Basic Pay + DA)** |  |  |  |  |  |  |  |  |
| **(i) to (iii) whichever is least is exempted** | |  |  |  |  |  |  |  |  |
| **3** |  | **Balance (1-2)** |  |  |  |  |  |  |  |  |
| **4** | **Deduct:** | **a Standard Deduction (Rs. 50,000/-)** |  |  |  |  |  |  |  |  |
| **b Conveyance Allowance** |  |  |  |  |  |  |  |  |
| **c Profession Tax Paid** |  |  |  |  |  |  |  |  |
| **5** | **Net Salary Income (3-4)** | |  |  |  |  |  |  |  |  |
| **6** | **Deduct interest on HBA (Max Rs. 30,000 before 1.4.1999 or 2 Lakh. Sec 24(b)** | |  |  |  |  |  |  |  |  |
| **7** | **Any other income (Business, Capital Gains or Other Sources)** | |  |  |  |  |  |  |  |  |
| **8** | **Gross Total Income (5-6+7)** | |  |  |  |  |  |  |  |  |
|  | **(a) Health Insurance - Mediclaim (maximum of Rs.25,000 / 50,000 + parents Rs.25,000 / 50,000)** | |  |  |  |  |  |  |  |  |
|  | **(b) Expense on treatment of mentally or physically handicapped dependents** | |  |  |  |  |  |  |  |  |
|  | **(c) Expenditure on medical treatment of the employee for specified deceases** | |  |  |  |  |  |  |  |  |
|  | **(d) Interest on Educational Loan for higher education for self or dependent children** | |  |  |  |  |  |  |  |  |
|  | **(e) Donation to various charitable and other funds including PMs National Relief Fund** | |  |  |  |  |  |  |  |  |
|  | **(f) Contribution made to political party / electoral trust** | |  |  |  |  |  |  |  |  |
|  | **(g) Deduction for person with disability (Rs. 75,000; if disability over 80% Rs. 1.25 lakh)** | |  |  |  |  |  |  |  |  |
|  | **(h) Subscription to long term infrastructure Bonds u/s.80CCF (max. Rs. 20,000/-)** | |  |  |  |  |  |  |  |  |
|  | **(i) Remaining Contribution to NPS (Max Rs.50,000)** | |  |  |  |  |  |  |  |  |
|  | **(j) Interest paid for Electric Vehicle Loan (Max : Rs. 1.5 Lakh)** | |  |  |  |  |  |  |  |  |
|  | **(k)** | |  |  |  |  |  |  |  |  |
|  | **(l)** | |  |  |  |  |  |  |  |  |
|  | **TOTAL** | |  |  |  |  |  |  |  |  |
| **10** | **Deductions under section 80C, 80CCC, 80CCD [max. Rs. 1,50,000/-]** | |  |  |  |  |  |  |  |  |
| **(a) Life Insurance premia of self, spouse or children** | |  |  |  |  |  |  |  |  |
| **(b) Purchase of NSC VIII issue** | |  |  |  |  |  |  |  |  |
| **(c) Contribution to GPF (Subscription, DA Arrear, Pay Revision Arrear, etc)** | |  |  |  |  |  |  |  |  |
| **(d) Contribution to SLI, GIS, FBS, GPAIS, etc (Total)** | |  |  |  |  |  |  |  |  |
| **(e) Term deposit with Scheduled Bank for a fixed period of not less than 5 years** | |  |  |  |  |  |  |  |  |
| **(f) Purchase of tax saving units of Mutual Fund or UTI** | |  |  |  |  |  |  |  |  |
| **(g) Tution fees for full-time education to any 2 children** | |  |  |  |  |  |  |  |  |
| **(h) Housing Loan Repayment (Principal) and Stamp duty paid for purchase of property** | |  |  |  |  |  |  |  |  |
| **10 (i) Subscription to equity shares or debentures of an eligible issue** | |  |  |  |  |  |  |  |  |
| **(j) Contribution to PPF account of Self, Spouse or Children** | |  |  |  |  |  |  |  |  |
| **(k) Subscription of Infrastructure Bonds of NABARD** | |  |  |  |  |  |  |  |  |
| **(l) Deposit under Seniour Citizen Saving Scheme** | |  |  |  |  |  |  |  |  |
| **(m) Five year Time Deposit in Post Office** | |  |  |  |  |  |  |  |  |
| **(n) Contribution to NPS (Max 10% of Basic+DA)** | |  |  |  |  |  |  |  |  |
| **(o) Payment to Annuity Plan of Pension fund like LIC** | |  |  |  |  |  |  |  |  |
| **(p)** | |  |  |  |  |  |  |  |  |
| **(q)** | |  |  |  |  |  |  |  |  |
| **TOTAL** | |  |  |  |  |  |  |  |  |
| **11** | **Total Income rounded off to nearest multiple of ten rupees ( 8 - 9 - 10 )** | |  |  |  |  |  |  |  |  |
| **12** | **12 Tax on Total Income** | |  |  |  |  |  |  |  |  |
| **13** | **13 Less: Rebate for the Income upto 5 Lakhs u/s 87 A ( Max Rs. 12,500 )** | |  |  |  |  |  |  |  |  |
| **14** | **14 Income tax after Rebate ( 12 - 13 )** | |  |  |  |  |  |  |  |  |
| **15** | **15 Health and Education Cess [ @ 4% of (14) ]** | |  |  |  |  |  |  |  |  |
| **16** | **16 Surcharge [ 10% of (14) if (11) > 50 lakh; 15% if (11) > 1 crore ]** | |  |  |  |  |  |  |  |  |
| **17** | **17 Total Tax Payable ( 14 + 15 + 16 )** | |  |  |  |  |  |  |  |  |
| **18** | **18 Less: Relief for arrears of salary u/s. 89(1)** | |  |  |  |  |  |  |  |  |
| **19** | **19 Balance Tax Payable ( 16 - 17 )** | |  |  |  |  |  |  |  |  |
| **20** | **20 Amount of Tax already deducted from salary** | |  |  |  |  |  |  |  |  |
| **21** | **21 Balance Income Tax to be paid 0** | |  |  |  |  |  |  |  |  |
| **22** | **22 Income Tax to be deducted monthly - 12 installments (Rounded up to 100)** | |  |  |  |  |  |  |  |  |
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| **Place** | |  |  |  |  |  |  |  |  |  |
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| **Date** | | **Signature** |  |  |  |  |  |  |  |  |
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