

**Enter info in BLOCK CAPITALS & send back or send electronically on Excel Sheet available on website www.taxwomanpune.com. NO ORIGINALS ARE ACCEPTED. Only XEROX COPIES/ pdf files (black & white / greyscale) accepted. SENDING DOCU ELECTRONICALLY IS APPRECIATED.**  
**We file legally correct tax returns as per information made available to us at the time of filing. That information (especially information about Tax Deducted at Source) may be changed later by the tax deductor. In that case, you should enquire about the change only from the tax deductor.**

- |  |                         |            |
|--|-------------------------|------------|
| 1. CDA (O) No (Army No. for PBOR)  | 2. PAN (Copy required)  |            |
| 3. Rank, Full Name   |                         | Sex: M / F |
| 4. Fathers Name  | 5. Date of Birth        |            |
| 6. Income tax E-filing Password:   | 7. Aadhar (Compulsory): |            |
| 8. Unit Address (Only for communication. NOT for filing Income Tax Returns):                         |                         |            |
| 9. Home Address with District, State and PIN Code (Income Tax Returns will be filed on this address) |                         |            |
| 10 Bank A/c No.1:  | IFSC Code:              |            |
| Bank A/c No.2:   | IFSC Code:              |            |
| Bank A/c No.3:   | IFSC Code:              |            |
| Bank A/c No.4:   | IFSC Code:              |            |
| 11. Mobile Number:   | 12. E MAIL ID:          |            |

Note: 1. Copy of Aadhar Card is required so that we can link it with PAN 2. Write mothers name if NO Email ID

**Income from Salary and Tax Exemption on HRA**

1. Copies of all Forms 16 for Financial Year 2016-17 as downloaded from Website or as physically recd are required.
2. Copies of earlier Forms 16 or Income of earlier yrs actually recd (& AGI subscription) incl pre-commission pd by YOs (in case of arrears of pay /allowances /stipend. Year 2014-15. Rs: Year 2015-16. Rs.:
3. For HRA Exemption: Payslips from Mar 16 to Feb 17, Rent Agreement & Rent Recpts and Form 16 of F.Y. 2015-16.
4. In case of tax returns of earlier yrs, please confirm details of notice from income tax auth (by E Mail / Letter / SMS).
5. For PBOR, Form 16, payslips of Mar 2016 to Feb 2017 (both inclusive) & Children School Fee details are required.

**Income from House Property One**

1. Address of House with PIN Code.
2. House Loan Certificate. Principal Paid Rs: Interest paid Rs.:
3. Month and year of Taking Possession:
4. Interest paid prior to year of possession (If date of possession is after 1.4.2012). Rs:
5. Percentage of your ownership & relationship with co-owners (income / deductions will be applicable in percentage ratio). Was the income / deduction considered by you alone earlier or by joint owners also? NOC from co-owner(s) is required, if you are claiming full income / deduction. Give Complete Details.

6. Rent Received during the year 2016-17. Rs:
7. Name & PAN of Tenant (Mandatory):
8. House Tax Paid. Rs.:
9. Society Maint Charge paid by you. Rs:

**House Property Two, Three, Four (Similar info on Separate page required if you own more than one house)**

### Other Income

1. Pension Received (whether Re-employed or NOT). Rs.: Is your pension TAX - FREE [being disability pension / pension of Gallantry Award Winner (SM Gallantry, PVC, MVC, VrC, AC, KC, SC)]? YES / NO
2. Interest from Savings Bank A/c. Rs.:
3. Interest from F.D.s.. Rs.:
4. Interest from Post Office Schemes. Rs.:
5. Dividends from Shares / MF. Rs.:
6. Agricultural Income of the year after deducting expenditure for Agriculture. Rs.:

### Capital Gains from Shares / Securities (Details required before 1st July 2017)

1. Holding Statement as on 31.3.2015, 31.3.2016 and 31.3.2017
2. Sale / Purchase Details (Name of Script, No of shares, Date & Amount are reqd) during F.Y.2015-16 and 2016-17

### Capital Gains from Property (Details required before 1st July 2017)

1. Sale Deed of property sold between 1.4.2016 and 31.3.2017. Sale Amount. Rs.:
2. Purchase Deed of Sold property given in 1 above. Purchase Amt & Stamp Duty / Regn Charges Rs.:
3. Details of Capital Expenditure (with proof) between Purchase in 2 above and Sale in 1 above.: Rs.:
4. Use (or intended use) of Money received from 1 above.

### Investments for Tax Saving Purpose (those NOT mentioned on Form 16 are required to be given here)

1. Insurance Premia, PPF etc. Rs.: Health Insurance Premia for self / dependents Rs.:
2. Health Insurance Premia Parents & Medical Treatment Expdr for Very Senior Citizen Parents. Rs.:
3. Money spent on medication for incurable disease. Rs.: (Cert in Form 10-I required)
4. Disability Cert for Self / Dependents reqd if disabled. 5. National Pension System. Rs.:
6. Amt of deduction under RGESS in F.Y. 2016-17, F.Y 2015-16 & F.Y. 2014-15 Rs.:
7. Education Loan Interest Paid for Self / Children: Rs.
8. Donation given to Charity / Religious Institution. Rs.: (PAN of Institution):
9. Any other Financial Information that you want give with proof of the same.

I hereby certify that the information given above is true.

PAN:

Signature :

### DETAILS OF OUR PROFESSIONAL FEES (PAYABLE IN ADVANCE)

**DIRECT PAYMENT INTO OUR ACCOUNT EITHER BY CASH OR BY CHEQUE IS NOT PERMITTED**

Our professional fees are Rs. 1000 /- for Families, for Retired offrs, for Re-emp offrs, for Tax Relief on Arrears, for HRA Exemption & Min Rs. 1000 /- for Capital Gains Working. Fees are Rs. 500 /- for other tax returns. Our fee will be Rs. 400, 300, 250 & 200 per individual per tax return provided we get more than 10, 50, 100 or 300 returns together respectively & provided the data is given in Excel Sheet in our given format (available on enquiry). Fee is optional for Serving Gallantry Award Winners (PVC, MVC, VrC, AC, KC, SC, SYSM & UYSM). 50% concession is granted to ALL RANKS of 4 MADRAS (WLI) unconditionally & to ALL Officers commissioned in Dec 1980 / Jan 1981 provided they use only our services for family members. 50% Fee will be refunded to clients making investment in any Mutual Fund through us or in DHFL Premarica Insurance Policy through us. Fees can be paid by Cheque (CTC 2010 compliant Cheque) / MO / DD payable at Pune. Fees can also be paid THROUGH INTERNET to Current A/c No. 34983754785, A/c Name: TAX AND LEGAL SOLUTIONS, SBI Karvenagar, Pune - 411052, IFSC: SBIN0013530, MICR : 411002082 OR to Savings A/c No. 624001559699 A/c Name: Sharadchandra Shankarrao Patil, ICICI Bank Ltd, Bhandarkar Road, Pune. IFSC: ICIC0006240, MICR: 411229006. Mention Name and PAN No in the msg box during internet payment & send us the receipt.

### **TAX AND LEGAL SOLUTIONS**

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