

Checklist Of Documents Required For Tax Saving Investments

It is a good habit to maintain a file or a folder of documents required for Income-tax return filing as well as for tax saving investments. If documents are already submitted to the employer for claiming deductions and he has issued Form 16, then it may not be necessary to preserve these documents as there is already a proof. In case you are not a salaried person, then the following

List of Investments u/s 80C –

1. Life Insurance Premium receipts
2. Deferred Annuity receipts
3. N.S.C. Accrued Interest receipts
4. Provident Fund contribution receipts
5. Receipt of Term Deposit for 5 year or more with scheduled bank
6. Receipt of Public Provident Fund contribution
7. Receipt of Senior citizen saving scheme deposit
8. Receipt of Contribution made to superannuation fund
9. Receipt of Tuition fees
10. Receipt of Investment in Debentures / Shares of Companies as approved by CBDT
11. Receipt of Time Deposit for 5 year with Post Office
12. Receipt of Subscription towards Mutual Fund units
13. Receipt of Principal Repayment of housing Loan/Stamp duty, registration fees & other exps. for purchase of such house property
14. Receipt of Subscription to notified deposit scheme
15. Receipt of Subscription to notified deposit scheme of National Housing Bank
16. Receipt of Contribution made to Unit Linked Insurance Plan
17. Others relevant receipts

List of Investments u/s 80CCC –

1. Receipts of Contribution to Pension Funds

List of Investments u/s 80CCD –

1. Receipts of Contribution to Retirement Benefit Pension Scheme- 80CCD1 (by employee)
2. Receipts of Contribution to Retirement Benefit Pension Scheme- 80CCD1B (by employee)
3. Receipts of Contribution to Retirement Benefit Pension Scheme- 80CCD2 (by employer)

List of Investments u/s 80CCG -

1. Receipts of Investment in shares under Rajiv Gandhi Equity Scheme

List of Investments u/s 80EE -

1. Documents supporting Interest on Housing loan for first home

All these documents will be required for claiming all the tax saving benefits. The applicability of these documents would differ from person to person. One doesn't have to attach any of the documents with the Income-tax return but preserve the same for record purpose as these are very important in case of income tax assessment or scrutiny.