

PAY AND ACCOUNTS OFFICE /IAD

O/O THE PRINCIPAL ACCOUNTANT GENERAL (A&E)

TAMILNADU, CHENNAI – 600 018

INCOME TAX PROFORMA FOR THE F.Y.2026-2027 A.Y.2027-2028

(Please fill up all the relevant columns. Incomplete forms will not be accepted)

PPO NUMBER:

NAME:

PAN:

BASIC PENSION:

RESIDENTIAL ADDRESS:

MOBILE:

AADHAAR:

1. GROSS PENSION

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2. ARREARS IF ANY

.....

3. DR arrears

..... /

4. GROSS TOTAL INCOME

.....

Standard Deduction

50,000

Less Deduction under Sec 80 C

5. POSTAL LIFE INSURANCE

.....

6. L.I.C.

Policy No.

Sum assured

Premium paid

i.

(M/Q/H/A)

ii.

(M/Q/H/A)

iii.

(M/Q/H/A)

7. PPF (enclose photo copy of the Pass book)

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8. N.S.C purchased during the year 2026-2027

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9. Post Office/SBI/PSB - Five Year Time Deposit Scheme:-

(Any amount withdrawn before expiry of 5 years from the date of deposit, will be treated as 'income' and liable for Income Tax in the year of withdrawal)

10. Contribution to Jeevan Suraksha/Pension Plan under Sec. 80CCC

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11. TOTAL INVESTMENT

(Not to exceed ` 1, 50,000) Sec.80CCE

.....

12. TOTAL INCOME (4-11)

.....

OTHER SECTIONS:

13. (a) Medical insurance premium in r/o Self / Spouse /
Children/Contribution to CGHS/any payment for
Preventive health check -up (up to a maximum
of 55,000/-) Sec.80 (D)
- (b) Additional amount up to a maximum of
(55,000/-in r/o Sr. Citizen) Sec.80 (D)
- Mutual fund, HDFC Life, SBI life, Equity saving scheme
14. Medical treatment of handicapped Dependents/ -Sec.80DD
(Max. ` 75, 000/- . For Severe disability ` 1,25,000/-)
- Sec.80U self max Rs.75000/- for severe disability 1,25,000/-
15. Interest on Education Loan (Sec.80E)
16. TOTAL TAXABLE INCOME {12-(13+14+15)}
17. TAXABLE INCOME

TAX CALCULATION AND RECOVERY

FOR OLD REGIME

For Taxable Income up to 3,00,000/- Nil

If Total Income exceeds above 5,00,000/-
From ` 3,00,001/- to ` 5, 00,000/- 5%
From ` 5, 00,001/- to ` 10, 00,000/- 20%
From ` 10, 00,001/- and above 30%
Education Cess @ 4% of Total Tax

For Super Senior Pensioners (80+ years)
For Taxable Income up to 5,00,000/- Nil
From ` 5, 00,001/- to ` 10, 00,000/- 20%
From ` 10, 00,001/- and above 30%
Education Cess @ 4% of Total Tax

FOR NEW REGIME

For Taxable Income Up to 12,00,000/-Nil

If Total Income exceeds Above 12,00,000/-
From 4,00,001/- to 8,00,000/- 5%
From 8,00,001/- to 12,00,000/- 10%
Form 12,00,001/- to 16,00,000/- 15%
From 16,00,001/- to 20,00,000/- 20%
From 20,00,001/- to 24,00,000/- 25%
Above 24,00,001/- - 30%
Education Cess @ 4% of Total Tax

Tax already recovered from March 2025 till date

Balance Tax to be recovered

The above tax may be recovered from pension fromTo.....at the rate of ` /- per month.

SIGNATURE OF THE PENSIONER

DECLARATION

I _____ do hereby declare that stated above is
true to the best of my knowledge and belief.

Verified today, theday of2026

Place :

Date :

SIGNATURE OF THE PENSIONER