

## FORM 15 (H)

See Section 197A(1C) and Rule 29(C)



Declaration under Section 197A(1C) to be made by an individual who is of the age of 60 years or more claiming certain incomes without deduction of tax

Customer ID 

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### PART I

1. Name of Assessee (Declarant)			2. PAN of the Assessee <sup>1</sup>		
3. Date of Birth <sup>2</sup> (DD/MM/YYYY)		4. Previous Year (P.Y.) <sup>3</sup> (for which declaration is made)			
5. Flat / Door / Block No.	6. Name of Premises	7. Road / Street / Lane	8. Area / Locality		
9. Town / City / District	10. State	11. PIN	12. Email		
13. Telephone No. (with STD Code) and Mobile No.		14. (a) Whether assessed to tax under the Income Tax Act, 1961 <sup>4</sup> : Yes <input type="checkbox"/> No <input type="checkbox"/> (b) If yes, latest assessment year for which assessed:			
15. Estimated income for which declaration is made		16. Estimated total income of the P.Y. in which income mentioned in column 15 to be included <sup>5</sup>			
17. Details of Form No. 15H other than this form filed during the previous year, if any <sup>6</sup>					
Total No. of Form 15H filed			Aggregate amount of income for which Form 15H filed		
18. Details of income for which the declaration is filed					
	S No.	Identification Number of relevant investment / account etc. <sup>7</sup>	Nature of income	Section under which tax is deductible	Amount of income
	1.				
	2.				
	3.				
	4.				
	5.				

\_\_\_\_\_  
Signature of Declarant

Please note that the above-mentioned details will be updated in our records after due validation. We shall inform you in case there is a discrepancy.

#### Declaration / Verification<sup>8</sup>

\*I/We .....do hereby declare that I am resident in India within the meaning of Section 6 of the Income Tax Act 1961. I also hereby declare that to the best of my/our knowledge and belief what is stated above is correct, complete and is truly stated and that the incomes referred to in this form are not includible in the total income of any other person under Sections 60 to 64 of the Income Tax Act 1961. \*I/We further declare that the tax on \*my/our estimated total income, including \*income/incomes referred to in Column 15 \*and aggregate amount of \*income/incomes referred to in column 17 above, computed in accordance with the provisions of the Income Tax Act 1961, for the previous year ending on .....relevant to the assessment year .....will be nil.

Place: .....  
Date: .....

\_\_\_\_\_  
Signature of Declarant ⊗

### PART II [To be filled by the person responsible for paying the income referred to in column 15 of Part I]

1. Name of the person responsible for paying YES BANK LTD		2. Unique Identification Number <sup>9</sup>	
3. PAN of the person responsible for paying AAACY2068D	4. Complete Address YES BANK LTD., Nehru Centre, 9 <sup>th</sup> Floor, Discovery of India, Dr. A.B. Road, Worli, Mumbai - 400018	5. TAN of the person responsible for paying MUMY02084F	
6. Email	7. Telephone No. (with STD code) and Mobile No. (22) 66699000	8. Amount of income paid <sup>10</sup>	
9. Date on which declaration is received (DD/MM/YYYY)	10. Date on which the income has been paid / credited (DD/MM/YYYY)		

Place: .....  
Date: .....

\_\_\_\_\_  
Signature of Person responsible for  
paying the income referred to in column  
15 of Part I ⊗

## NOTES

\* Delete whichever is not applicable

\* **The declaration should be furnished in triplicate**

- 1 As per provisions of section 206AA(2), the declaration under section 197A(1C) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN).
- 2 Declaration can be furnished by a resident individual who is of the age of 60 years or more at anytime during the previous year.
- 3 The financial year to which the income pertains.
- 4 Please mention "Yes" if assessed to tax under the provisions of Income-tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
- 5 Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made.
- 6 In case any declaration(s) in Form No. 15H is filed before filing this declaration during the previous year, mention the total number of such Form No. 15H filed along with the aggregate amount of income for which said declaration(s) have been filed.
- 7 Mention the distinctive number of shares, account number of term deposit, recurring deposit, National Savings Schemes, life insurance policy number, employee code, etc.
- 8 Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income-tax Act, 1961 and on conviction be punishable-
  - (i) in a case where tax sought to be evaded exceeds twenty-five lakh rupees, with rigorous imprisonment which shall not be less than six months but which may extend to seven years and with fine;
  - (ii) in any other case, with rigorous imprisonment which shall not be less than three months but which may extend to two years and with fine.
- 9 The person responsible for paying the income referred to in column 15 of Part I shall allot a unique identification number to all the Form No. 15H received by him during a quarter of the financial year and report this reference number along with the particulars prescribed in rule 31A(4)(vii) of the Income-tax Rules, 1962 in the TDS statement furnished for the same quarter. In case the person has also received Form No.15G during the same quarter, please allot separate series of serial number for Form No.15H and Form No.15G.
- 10 The person responsible for paying the income referred to in column 15 of Part I shall not accept the declaration where the amount of income of the nature referred to in section 197A(1C) or the aggregate of the amounts of such income credited or paid or likely to be credited or paid during the previous year in which such income is to be included exceeds the maximum amount which is not chargeable to tax after allowing for deductions under Chapter VI A, if any, or set off of losses, if any, under the head "income from house property" for which the declarant is eligible. For deciding the eligibility, he is required to verify income or the aggregate amount of incomes, as the case may be, reported by the declarant in columns 15 and 17.

## TO BE FILLED BY THE BRANCH

**Checklist for Form 15 (H) for Individuals greater than or equal to 60 years of age**

I have checked and confirmed the below:	Tick
1. Customer is >=60 years (if < 60 years then fill form 15 G)	
2. PAN is updated in Bank Records against the Customer ID of customer	
3. Copy of PAN Card attached along with Account Maintenance Form (if not updated in the system)	
4. Customer has signed in six places (indicated by ⊗)	

Name of Employee \_\_\_\_\_

Employee Code \_\_\_\_\_

Employee Signature \_\_\_\_\_

Date: \_\_\_\_\_

Branch Stamp \_\_\_\_\_

**FORM 15 (H)**  
See Section 197A(1C) and Rule 29(C)



Declaration under Section 197A(1C) to be made by an individual who is of the age of 60 years or more claiming certain incomes without deduction of tax

Customer ID

**PART I**

1. Name of Assessee (Declarant)			2. PAN of the Assessee <sup>1</sup>		
3. Date of Birth <sup>2</sup> (DD/MM/YYYY)		4. Previous Year (P.Y.) <sup>3</sup> (for which declaration is made)			
5. Flat / Door / Block No.	6. Name of Premises	7. Road / Street / Lane	8. Area / Locality		
9. Town / City / District	10. State	11. PIN	12. Email		
13. Telephone No. (with STD Code) and Mobile No.		14. (a) Whether assessed to tax under the Income Tax Act, 1961 <sup>4</sup> : Yes <input type="checkbox"/> No <input type="checkbox"/> (b) If yes, latest assessment year for which assessed:			
15. Estimated income for which declaration is made		16. Estimated total income of the P.Y. in which income mentioned in column 16 to be included <sup>5</sup>			
17. Details of Form No. 15H other than this form filed during the previous year, if any <sup>6</sup>					
Total No. of Form 15H filed			Aggregate amount of income for which Form 15H filed		
18. Details of income for which the declaration is filed					
	S .No.	Identification Number of relevant investment / account etc. <sup>7</sup>	Nature of income	Section under which tax is deductible	Amount of income
	1.				
	2.				
	3.				
	4.				
	5.				

\_\_\_\_\_  
Signature of Declarant

Please note that the above-mentioned details will be updated in our records after due validation. We shall inform you in case there is a discrepancy.

**Declaration / Verification<sup>8</sup>**

\*I/We .....do hereby declare that I am resident in India within the meaning of Section 6 of the Income Tax Act 1961. I also hereby declare that to the best of my/our knowledge and belief what is stated above is correct, complete and is truly stated and that the incomes referred to in this form are not includible in the total income of any other person under Sections 60 to 64 of the Income Tax Act 1961. \*I/We further declare that the tax on \*my/our estimated total income, including \*income/incomes referred to in Column 15 \*and aggregate amount of \*income/incomes referred to in column 17 above, computed in accordance with the provisions of the Income Tax Act 1961, for the previous year ending on .....relevant to the assessment year .....will be nil.

Place: .....  
Date: .....

\_\_\_\_\_  
Signature of Declarant <sup>⊗</sup>

**PART II [To be filled by the person responsible for paying the income referred to in column 15 of Part I]**

1. Name of the person responsible for paying YES BANK LTD		2. Unique Identification Number <sup>9</sup>	
3. PAN of the person responsible for paying AAACY2068D	4. Complete Address YES BANK LTD., Nehru Centre, 9 <sup>th</sup> Floor, Discovery of India, Dr. A.B. Road, Worli, Mumbai - 400018	5. TAN of the person responsible for paying MUMY02084F	
6. Email	7. Telephone No. (with STD code) and Mobile No. (22) 66699000	8. Amount of income paid <sup>10</sup>	
9. Date on which declaration is received (DD/MM/YYYY)	10. Date on which the income has been paid / credited (DD/MM/YYYY)		

Place: .....  
Date: .....

\_\_\_\_\_  
Signature of Person responsible for  
paying the income referred to in column  
15 of Part I <sup>⊗</sup>

## NOTES

\* Delete whichever is not applicable

\* **The declaration should be furnished in triplicate**

- 1 As per provisions of section 206AA(2), the declaration under section 197A(1C) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN).
- 2 Declaration can be furnished by a resident individual who is of the age of 60 years or more at anytime during the previous year.
- 3 The financial year to which the income pertains.
- 4 Please mention "Yes" if assessed to tax under the provisions of Income-tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
- 5 Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made.
- 6 In case any declaration(s) in Form No. 15H is filed before filing this declaration during the previous year, mention the total number of such Form No. 15H filed along with the aggregate amount of income for which said declaration(s) have been filed.
- 7 Mention the distinctive number of shares, account number of term deposit, recurring deposit, National Savings Schemes, life insurance policy number, employee code, etc.
- 8 Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income-tax Act, 1961 and on conviction be punishable-
  - (i) in a case where tax sought to be evaded exceeds twenty-five lakh rupees, with rigorous imprisonment which shall not be less than six months but which may extend to seven years and with fine;
  - (ii) in any other case, with rigorous imprisonment which shall not be less than three months but which may extend to two years and with fine.
- 9 The person responsible for paying the income referred to in column 15 of Part I shall allot a unique identification number to all the Form No. 15H received by him during a quarter of the financial year and report this reference number along with the particulars prescribed in rule 31A(4)(vii) of the Income-tax Rules, 1962 in the TDS statement furnished for the same quarter. In case the person has also received Form No.15G during the same quarter, please allot separate series of serial number for Form No.15H and Form No.15G.
- 10 The person responsible for paying the income referred to in column 15 of Part I shall not accept the declaration where the amount of income of the nature referred to in section 197A(1C) or the aggregate of the amounts of such income credited or paid or likely to be credited or paid during the previous year in which such income is to be included exceeds the maximum amount which is not chargeable to tax after allowing for deductions under Chapter VI A, if any, or set off of losses, if any, under the head "income from house property" for which the declarant is eligible. For deciding the eligibility, he is required to verify income or the aggregate amount of incomes, as the case may be, reported by the declarant in columns 15 and 17

## DISCLAIMER

1. Form 15H is to be filled only for Individuals greater than or equal to 60 years (if < 60 yrs then fill Form 15G).
2. TDS waiver will not be marked if PAN details are not updated on the Bank's records
3. TDS waiver will be marked from the date of submission of this form
4. TDS which has already been deducted will not be refunded back and to be sought from Income Tax Department
5. A fresh Form 15H needs to be submitted in each new Financial Year within the start of the Financial Year
6. Form 15H needs to be submitted in Triplicate
7. Form 15H needs to be submitted for every Fixed Deposits booked with the Bank
8. The Bank shall not be liable for any consequences or loss arising due to delay or non or wrong submission of Form 15H
9. I/We fully understand that wrong quoting of PAN may result in penal consequences under section 272B of Income Tax act 1961 and the bank is not responsible for any consequences arising due to wrong quoting of PAN

Branch Seal with  
signature and date

**FORM 15 (H)**  
See Section 197A(1C) and Rule 29(C)



**Declaration under Section 197A(1C) to be made by an individual who is of the age of 60 years or more claiming certain incomes without deduction of tax**

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Branch Seal with  
signature and date