

BEST PICKS TAX PLANNING

STRESS BUSTERS PLAN





Welcome to Marketgoogly

Client Name:

We are happy to present your Tax plan. Our team continuously strives in making the plan as relevant and realistic as possible. We want to know as much as we can about you so we can guide you in making intelligent decisions.

We want to understand what motivates you to spend, save, and work so that we can help you achieve your life goals, whatever they are.

The Tax plan has the following sections. Each section is designed to give you a better understanding of your financial circumstances, and what's projected for the future.

- Taxable Income
- Expert Recommendations
- Tax Saving Instruments
- Action Plan

A periodic review will be necessary to keep your report up to date and pertinent to your life. If, after a thorough review of the plan, you feel you'd like to make different assumptions, we'll be happy to make adjustments based on whatever assumptions you may wish to adopt.

All the best and let us know if you have any questions,

- Phone: 9957556611
- [E-mail: support@marketgoogly.com](mailto:support@marketgoogly.com)

FINANCIAL PLANNING PROCESS





TAXABLE INCOME

Particulars	Amount (Rs)
Income per month	50,000
HRA Per month (Basic 10000)	-5000
Taxable Income per month	45,000
Annual Taxable Income	5,40,000
Less Child Education Allowance	-2400
Income less Exemptions	5,37,600
Deduction Claimed under Section 80 C	50,000
Net Taxable Income	4,87,600
Amount Exceeding Rs 2.5 lakhs	2,37,600
Tax to be Paid	23,760
Cess	4%
Total	24,710



Expert Recommendations



- Your current Section 80C limit is met by 1. PPF = ₹ 12,000/annum.
- 2. Home Loan Principal Repayment = ₹ 2,38,010/annum.
- Based on your risk profile (Moderate Risk Taking) you should invest in ELSS fund for your Section 80C remaining limit.

Tax Saving Instruments Recommendations

Investment	Returns	Taxation	Lock-in
ELSS	10%	EET, 10% LTCG	3 years lock in



DISCLAIMER

This tax plan is for the sole use of the person to whom it is addressed and for no other purpose. No responsibility is accepted to any third party who may use or rely on the content of the tax plan.

This tax plan is designed from the personal information and documents furnished to us by you. The plan is an attempt to help you lay a roadmap to achieve your financial goals in a systematic and simplistic manner.

The tax plan is intended only as a basis for discussion with us or, for that matter, any financial advisor. The estimates shown in this report are based on many assumptions that may or may not occur. Your investment returns will fluctuate over time.

The only assurance is that over time, every investment program is likely to produce some losses on the road to achieving long-term gains.

No warranty as to correctness is given and no liability is accepted for any error, or omission, or any loss, which may arise from relying on this data. This service agreement is not enforceable by law and is a document of trust and faith.

While external factors like inflation, rate of return on investments, etc. changes continuously, so does your financial situation. You are advised to periodically review the tax plan to make sure you are on track to achieve your financial goals. This plan is an on-going exercise as part of your long-term tax planning process.

This plan is only as accurate as of the information on which it was based. If the data originally supplied to us is incorrect, the plan will reflect these inaccuracies, and these errors will project into the future at a magnified rate.

It is essential that the tax, accounting or legal planning steps be considered only with the advice of your lawyer, chartered accountant, and your other financial advisors, which we will be happy to coordinate with. You are under no obligation to act upon the recommendations/ action plan listed down the tax plan.

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Delivery Acknowledgement

We acknowledge that we have understood the Tax plan presented to us by Marketgoogly. The Tax plan prepared by Marketgoogly is in accordance with the facts and figures provided by us. We further understand that estimates shown in this report are based on many assumptions that may or may not occur. Our investment returns may fluctuate over time and Marketgoogly does not guarantee any returns on the investments.

We further acknowledge that we need to periodically review the tax plan to make sure we are on track to achieve our financial goals.

- Client Name: **XXX**
- Date: **XX-XX-XXXX**

