

Form NO. 15H

[See section 197A(1C) and rule 29C]

**SUNDARAM MUTUAL**

— Sundaram Finance Group —

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

1. Name of Assessee (Declarant)	2. Permanent Account Number of the Assessee ¹	3. Date of Birth ² (DD/MM/YYYY)		
4. Previous year (P.Y.) ³ (for which declaration is being made) 2024-2025	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 ⁴ :		Yes		No
(b) If yes, latest assessment year for which assessed				
15. Estimated income for which this declaration is made				
16. Estimated total income of the P.Y. 2024-25 in which income mentioned in column 15 to be included ⁵				
17. Details of Form No.15H other than this form filed for the previous year, if any ⁶				
Total No. of Form No.15H filed		Aggregate amount of income for which Form No.15H filed		
19. Details of income for which the declaration is filed				
Sl. No.	Folio number ⁷	Nature of income	Section under which tax is deductible	Amount of income
		Dividend from Units of Mutual Fund	194K	

.....
Signature of the Declarant**Declaration/Verification⁸**

I.....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 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 further declare that the tax on my estimated total income including *income/incomes referred to in column 15 *and aggregate amount of *income/incomes referred to in column 17 computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31.03.2025 relevant to the assessment year 2025-26 will be nil.

Place:.....

Date:.....

.....
Signature of the 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 SUNDARAM MUTUAL FUND		2. Unique Identification No. ⁹		
3. Permanent Account of the person responsible for paying AAATS2554B	4. Complete Address Corporate Office: Sundaram Towers, I & II Floor, No. 46, Whites Road, Chennai - 600 014.		5. TAN of the person responsible for paying CHES06353E	
6. Email	7. Telephone No. (with STD Code) and Mobile No.	8. Amount of income paid ¹⁰		
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 the person responsible for paying the income referred to in column 15 of Part I



NOTES (For Filing Form 15H)

**Delete whichever is not applicable.*

- 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 or Aadhaar Number.*
- Declaration can be furnished by a resident individual who is of the age of 60 years or more at any time during the previous year.*
- The financial year to which the income pertains.*
- 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.*
- 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.*
- 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.*
- Mention the distinctive number of folio details maintained with Sundaram Mutual Fund.*
- 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—*
 - 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;*
 - 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.*
- 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.*
- 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 deduction(s) under Chapter VI-A, if any, or set off of loss, 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.*

**FOR THE KIND ATTENTION OF INVESTORS WHO ARE INDIVIDUALS AND SENIOR CITIZENS (AGED SIXTY YEARS OR MORE)
AND SUPER SENIOR CITIZENS (AGED EIGHTY YEARS OR MORE)**

Incomplete forms are not accepted by the Income Tax authorities and therefore, could result in deduction of tax at source. Please therefore, submit the form completed in all respects

- Income Tax, where applicable, will be deducted at source in accordance with the Income Tax Act, 1961, as amended to date. Deduction of income tax at source for the current financial year will be made where the dividend is paid / credited. Under the existing tax provisions the rate of deduction is 10%.*
- It may be noted that exemption from tax deduction will be granted only from the date of receipt of Form 15H and any tax deducted and remitted to the government before that date cannot be refunded under any circumstances*
- Form 15H is a self-declaratory form and does not require attestation.*
- Before returning the forms, investors are requested to ensure that all the columns are duly filled up and that the signatures have been affixed in the places marked*
- In case you have more than one Folio with us, all the Folio Nos. should be quoted in one form.*
- Any claim for return of tax after remittance to the credit of Central Government will have to be made by the depositor to the Income Tax Authorities through his/her Income Tax Returns.*
- Under the provisions of Section 206AA, quoting of Permanent Account Number (PAN) in the declaration form 15G/H in Clause No.2 is mandatory for non-deduction of Tax at Source. If PAN is not quoted in the declaration form, the form would be invalid and tax will be deducted.*