

# Wealth Tax Return

## Individual Asset Holder Format

### 1. Personal Information

Full Name

Enter full name

Tax Identification Number (TIN)

Enter TIN

Address

Enter address

Assessment Year

YYYY-YYYY

### 2. Statement of Assets

| # | Description of Asset | Location    | Date of Acquisition | Cost of Acquisition | Fair Market Value | Remarks |
|---|----------------------|-------------|---------------------|---------------------|-------------------|---------|
| 1 | Residential Property | City, State | YYYY-MM-DD          | XXX,XXX             | XXX,XXX           |         |
| 2 | Jewellery            | Safe Locker | YYYY-MM-DD          | XX,XXX              | XX,XXX            |         |
| 3 | Vehicle              | City, State | YYYY-MM-DD          | XX,XXX              | XX,XXX            |         |
| 4 | Shares & Securities  | -           | YYYY-MM-DD          | XX,XXX              | XX,XXX            |         |

### 3. Liabilities (if any) against the Assets

| # | Description of Liability | Amount Owed | Secured on Asset (Yes/No) | Remarks |
|---|--------------------------|-------------|---------------------------|---------|
| 1 | Home Loan                | XX,XXX      | Yes                       |         |
| 2 | Vehicle Loan             | X,XXX       | Yes                       |         |

### 4. Net Wealth Computation

|                       |         |
|-----------------------|---------|
| Total Value of assets | XXX,XXX |
| Less: Liabilities     | XX,XXX  |
| Net Taxable Wealth    | XXX,XXX |

### 5. Declaration

I hereby declare that the information furnished above is true, correct, and complete to the best of my knowledge and belief.

Place

Enter place

Date

YYYY-MM-DD

Signature

Enter name/signature

**Important Notes:**

- This document is a sample format for individual asset holders; actual requirements may vary as per jurisdiction.
- Attach supporting documents and valuation certificates where necessary.
- Ensure all information is accurate and verifiable to avoid penalties.
- Include both domestic and overseas assets as required by law.
- Consult a tax professional for assistance and compliance with current tax regulations.