

Wealth Tax Return

Trust Asset Holder Format

Assessment Year: _____

1. Name of the Trust

2. PAN/TIN

3. Address of Trust

4. Name of Author/Founder

5. Date of Creation of Trust

6. Type of Trust
(Private/Public/Discretionary/Non-Discretionary)

7. Name(s) of Trustees

1. _____

2. _____

3. _____

Statement of Assets Held Under Trust as on 31st March, _____

S. No.	Description of Asset	Location/Details	Value as per Wealth Tax Act	Remark
1	Immovable Property	_____	_____	_____
2	Jewellery/Bullion	_____	_____	_____
3	Shares/Securities	_____	_____	_____
4	Other Assets	_____	_____	_____
Total			_____	_____

Declaration:

I/We certify that the information furnished above is true and complete to the best of my/our knowledge and belief.

Place: _____

Date: _____

Signature: _____

Name & Designation: _____

Important Notes:

- This format is for trusts acting as asset holders under applicable Wealth Tax regulations.
- All values should be disclosed as per the provisions of the Wealth Tax Act and relevant rules.
- False declaration or incomplete information may render the trust and trustees liable under law.
- Supporting documents for assets declared should be maintained and produced upon request.
- Ensure this document is signed by authorized signatory/trustee and dated correctly.