

Annual Tax Document

For Trusts and Societies

Name of Trust/Society:

[Sample Charitable Trust]

PAN:

[AAATS0000A]

Registration Number:

[Reg/123/2020]

Assessment Year:

2023-24

Financial Year:

2022-23

Date of Filing:

[10/07/2023]

Address:

[123 Society Marg, City Name, State, 123456]

Email:

[info@sampletrust.org]

Contact Number:

[01234-567890]

Summary of Income and Expenditure

Particulars	Amount (INR)
Opening Balance	1,00,000
Donations Received	8,00,000
Other Income	20,000
Total Income	9,20,000
Administrative Expenses	2,40,000
Charitable Activities/Project Expenses	5,50,000
Other Expenditure	10,000
Closing Balance	1,20,000

Tax Computation

Gross Income	9,20,000
Exempt Income (Section 11/12)	7,00,000
Taxable Income	2,20,000
Tax Payable	Nil

Details of Trustees/Managing Committee

Name	Designation	Contact
Mr. Amit Sharma	President	9876543210

Name	Designation	Contact
Ms. Leena Joseph	Secretary	9876543222
Mr. Rajesh Jain	Treasurer	9876543233

Important Notes

- This document should be retained for a minimum of 7 years for reference and audit purposes.
- Ensure all information provided is accurate and matches the records filed with the Income Tax Department.
- Mandatory to file annual returns even if income is fully exempt under sections 11 and 12.
- Maintain supporting documents for donations, grants, and expenditures.
- Any significant changes in the managing committee must be reported to the relevant authorities.