



For Office Use  
DLN  
Date

## SCHEDULES TO RETURN OF INCOME - EXECUTORS & TRUSTEES

YEAR OF ASSESSMENT 2008/2009

Income Tax File No.

### SCHEDULE - 1: PROFITS FROM TRADE, BUSINESS, PROFESSION OR VOCATION

Name of Trade or Business	Nature	Address	Income (Rs.)
Total Income (Enter this amount in cage T010 of the Return)			T011

\* Attach Statement of Accounts

### SCHEDULE - 2: RENT AND/OR NET ANNUAL VALUE

#### 2A. RENT

Situation of Property	Rating Assessment	Gross Rent	Rates borne by the Owner	Allowance for Repairs	Net Income
Sub Total					T021

#### 2B. NET ANNUAL VALUE

Situation of Property	Rating Assessment	Net Annual Value
Sub Total		T022
Less- Net Annual Value of One place of Residence		T023
Balance Net Annual Value (T022-T023)		T024
Total Rents and Net Annual Value (T021+T024)(Enter this amount in cage T020 of Return)		T025

### SCHEDULE - 3: DIVIDENDS (if tax at 10% has not been deducted at source)

	Name of Company	Gross Dividend
1		
2		
3		
Total(Enter this amount in cage T030 of the Return)		T031

### SCHEDULE - 4: INTEREST ( if tax at 10% has not been deducted at source)

Bank or Financial Institution	Account Number	Interest Income (Rs.)
Total(Enter this amount in cage T040 of the Return)		T041

**SCHEDULE – 5: ANNUITIES AND ROYALTIES Etc.,**

<i>Description of Income</i>	<i>Particulars of Payer</i>	<i>Income (Rs.)</i>
<i>Total (Enter this amount in cage T050 of the Return)</i>		<i>T051</i>

**SCHEDULE – 6: INCOME FROM ANY OTHER SOURCE**

<i>Source of Income</i>	<i>Name &amp; Address of Payer, if any</i>	<i>Income</i>
<i>Total (Enter this amount in cage T060 of the Return)</i>		<i>T061</i>

**SCHEDULE – 7: DEDUCTIBLE LOSSES FROM TRADE, BUSINESS, PROFESSION OR VOCATION**

<i>Name of Business</i>	<i>Address of the Business</i>	<i>Nature of Business</i>	<i>Loss incurred During the Year of Assessment</i>
<i>Deductible Losses Brought Forward from the previous year</i>			<i>T071</i>
<i>Total</i>			<i>T072</i>
<i>35% of Total Statutory Income (35% cage T090 of the Return)</i>			<i>T073</i>
<i>Lower amount of T072 or T073(Enter this amount in cage T100 of the Return)</i>			<i>T074</i>
<i>Balance Deductible Losses Carried forward to the next year (T072-T074)</i>			<i>T075</i>

**Note 1.**

A loss incurred from any trade, business, profession or vocation will be allowed as a deduction if instead a loss it was a profit, it would have been assessable. However, the deduction of such losses is limited to a maximum of thirty five percent (35%) of the total statutory income for this year of assessment. Any loss that can not be so deducted can be carried forward to the next year of assessment and so on, and deducted on the same basis. In an instance where there are losses brought forward from previous year of assessment, the above limit will be applicable to the aggregate of the loss incurred in this year and the loss brought forward.

**SCHEDULE – 8: INTEREST, ANNUITIES, ROYALTIES AND GROUND RENT PAID****A. INTEREST**

<i>Name and Address of Recipient</i>	<i>Amount of Loan</i>	<i>Period for which payment is made</i>	<i>Date of Payment</i>	<i>Amount Payable</i>	<i>Amount Paid</i>
<i>Sub Total</i>					<i>T081</i>

**B. ANNUITIES, ROYALTIES AND GROUND RENT**

<i>Name and Address of Recipient</i>	<i>Period for which payment is made</i>	<i>Date of Payment</i>	<i>Amount Payable</i>	<i>Amount Paid</i>
<i>Sub Total</i>				<i>T082</i>
<i>Total (T081+T082) (Enter this amount in cage T110 of the Return)</i>				<i>T083</i>

**SCHEDULE – 9: QUALIFYING PAYMENTS**

Description	Date	Amount deductible During the Year (Rs)	Amount Carried forward(Rs)
Total (Enter total amount in cage T150 of the Return)			

**Note 2: Qualifying Payments**

Deduction in respect of qualifying payments can be made on the following basis

- (i). Donation to the Government, local authority, “Api Wenuwen Api” fund, may be carried forward indefinitely until the full amount of the qualifying payment is deducted
- (ii). Expenditure on any project including in a development plan of the Government, subject to a limit of Rs. 25,000
- (iii). Deduction in respect of other qualifying payments are subject to a limit of 1/3 of assessable income or Rs. 75,000 whichever is lower.

**SCHEDULE – 10: ANY PART OF THE INCOME OF THE ESTATE OR TRUST WHICH CAN BE ASCERTAINED AS INCOME TO WHICH ANY HEIR OR BENEFICIARY IS ENTITLED.**

Name of heir or beneficiary	I.T. File No	Address	Income to which beneficiary is entitled	Basis of determination of Income	Wealth to which beneficiary is entitled	Basis of Determination of wealth

Enter total amount in cage T155 of the Return

**SCHEDULE – 11: TAX CREDITS**

Income Tax paid in Installments (Attach copies of all Paying-in-slips)

	Date of Payment	Amount Paid (Rs.)	Amount (Rs.)
1 <sup>st</sup> Installments		T570	
2 <sup>nd</sup> Installments		T571	
3 <sup>rd</sup> Installments		T572	
4 <sup>th</sup> Installments		T573	
Final Payment		T574	
Total (Total of cage T570 to cage T574)			T576
Any Other, other than final WHT (Please specify)			T578
Total - Enter this amount in cage T240 of the Return(T576+T578)			T580

Date: ...../...../.....

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Signature



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TAXES – FOR A BETTER FUTURE