

Name of College: S. R. Luthra Institute of Management								
Faculty	Management			Program	Master of Business Administration (M.B.A.)			
Year	---			Version	1.0			
Semester	Odd			Effective From	June 2024			
Course Code	---	Course Name	Investment and Tax Planning (TOE) (Transdisciplinary Open Elective - TOE)					
Teaching Scheme								
				Examination Scheme				
Credits	Lecture (L)	Tutorial (T)	Practical (P)	ME	CE	SE	V	Total
02	02	--	--	--	--	--	--	--



Sr. No	Module	Description	Marks	Hours
1	I	<ul style="list-style-type: none"> What is Investment Planning? Concept of time value of money, debt and equity Characteristics of investments and its application on investment avenues Concepts of Risk and return Investment planning process Setting personal financial goals. Life cycle approach to financial planning. Retirement Need Analysis Salary structure and components 		15
2	II	<ul style="list-style-type: none"> Income-tax slabs for individuals, Tax Planning hints with References: to residential status, salary income, property income, capital gains Overview of Deductions Under Chapter – VI (A) for Individuals 80C, 80CCC, 80CCD (1), 80CCD (1B), 80 D, 80 DD, 80 DDB, 80E, 80 EE, 80 G, 80 GG, 80 TTA, 80 TTB. Form 16 Structure, Overview of AS – 26 Filing of IT Return, E-filing of IT Return TDS Reconciliation Analysis & Correction Enabling System (TRACES) 		15

References:

Books:	
1.	Investment Planning for Financial Professionals, Geoffrey A. Hirt , Stanley B. Block, Somnath Basu, McGraw-Hill Education Edition: 2006
2.	Personal Finance, Jack R. Kapoor, Les R. Dlabay, Robert J. Hughes, TMH, 11 th ed.
3.	Investment Planning Gujarati, Ankit Gala, Khushboo Gala, Buzzing Stock Publishing House Edition: 1 st , 2018
4.	The Only Financial Planning Book that You Will Ever Need, Amar Pandit, Network 18 Publications Edition: 1 st , 2012
5.	Retire Rich, P V Subramanyam, TV18 Broadcast Ltd. Edition: 2019
6.	Income Tax Planning and Management, Dr. R.K Jain, SBPD Publications Edition: 2021
Newspapers / Magazines / Journals:	
1.	Chartered Financial Analyst
2.	The Economic Times
3.	Business World
4.	Business Today
5.	http://incometaxmanagement.com/Pages/Gross-Total-Income/Salaries/Deduction-under-Chapter-VI-A.html

