## **Instructions and Guidelines for the Shareholder Portal**

The Shareholder Portal can be accessed at <a href="https://ir-pan-info.infosys.com/">https://ir-pan-info.infosys.com/</a>. Some of the important information about this portal and its related features are given below.

### 1. What is the usage of this Portal?

**Answer:** This Portal is aimed for submission of tax forms, tax documents and tax declarations applicable in relation to Tax Deduction at Source (TDS) / Withholding of Taxes (WHT) on payment of dividend to Resident and Non-resident shareholders.

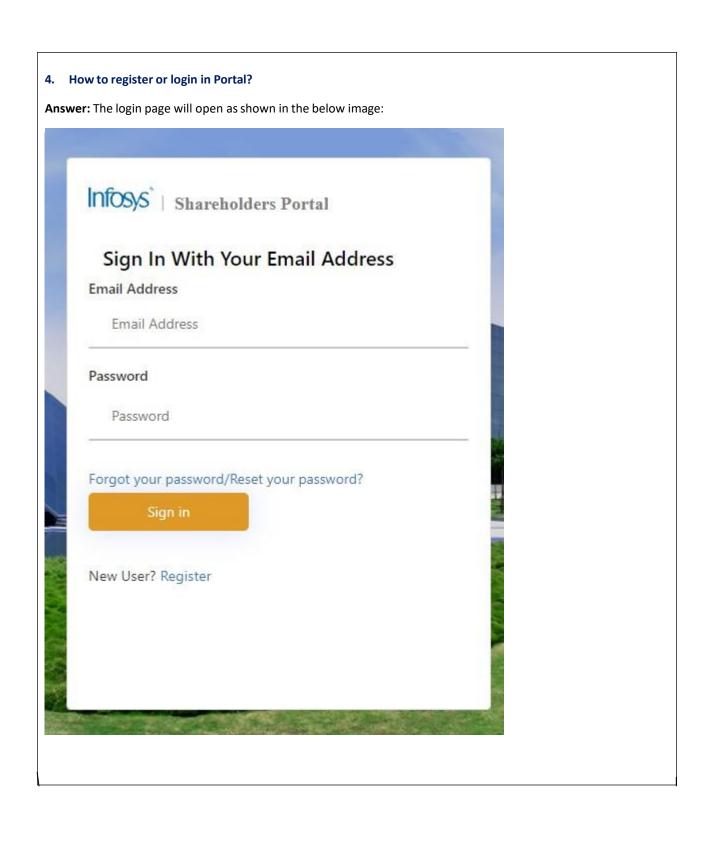
### 2. Who can use this Portal?

**Answer:** Any shareholder of Infosys Limited as on the record date for payment of dividend can register and login to this portal

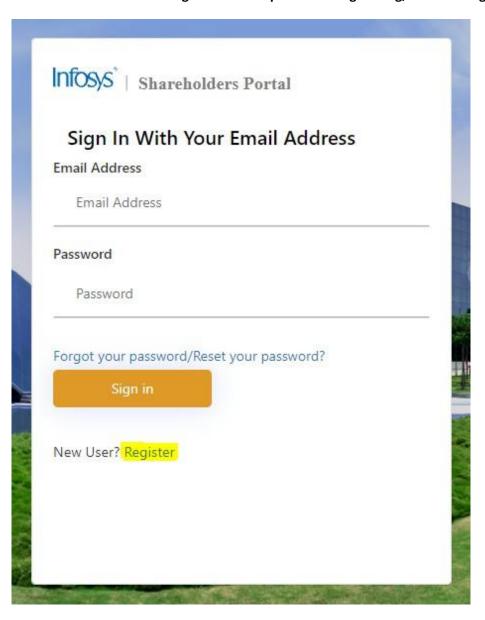
### 3. Where can the portal be accessed?

**Answer:** Portal can be accessed by clicking into the below hyperlink

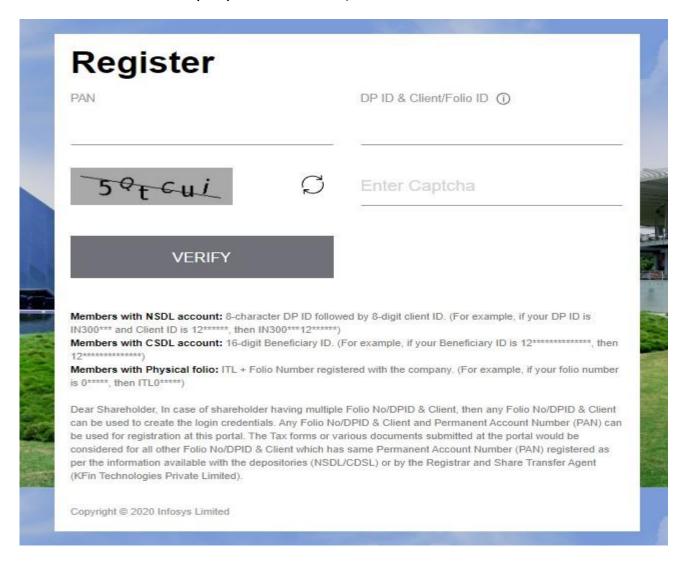
https://ir-pan-info.infosys.com/



First time user has to first register into the portal. For registering, click on "Register"



After clicking on "Register", a new window will open for registration. For making registration, please enter - Permanent Account number (PAN) and DP ID & Client/Folio ID.



#### Notes:

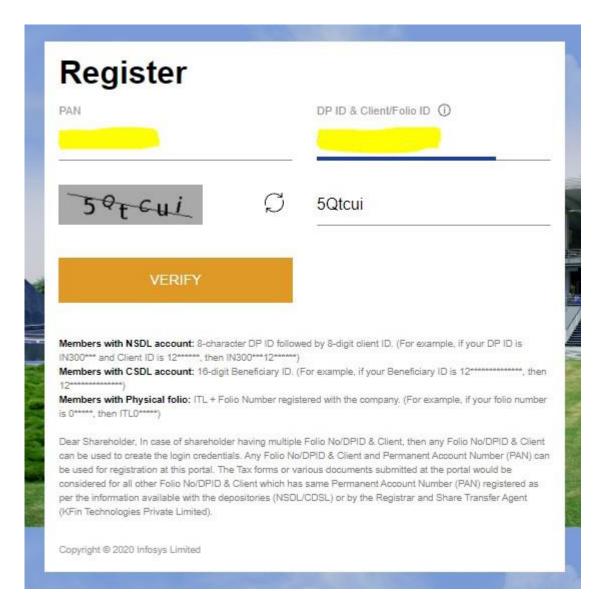
- a) PAN is Permanent Account Number allotted by the Income Tax Department.
- b) Kindly note of the below while filling "DP ID & Client/Folio ID" at the time of registration.
  - (i) Shares held in Physical mode Folio No. (Eg: ITL000000)
  - (ii) Shares held in Dematerialized Mode

NSDL - 8-digit DP ID and 8-digit client ID (Eg: IN3000001000000)

CDSL - 16-digit Beneficiary ID (Eg: 1200000000000000)

Once, "PAN" and "DP ID & Client/Folio ID" are filled, enter the Captcha as shown therein and then click on

"VERIFY"



After clicking onto "VERIFY", Shareholder shall enter "Username" and password.

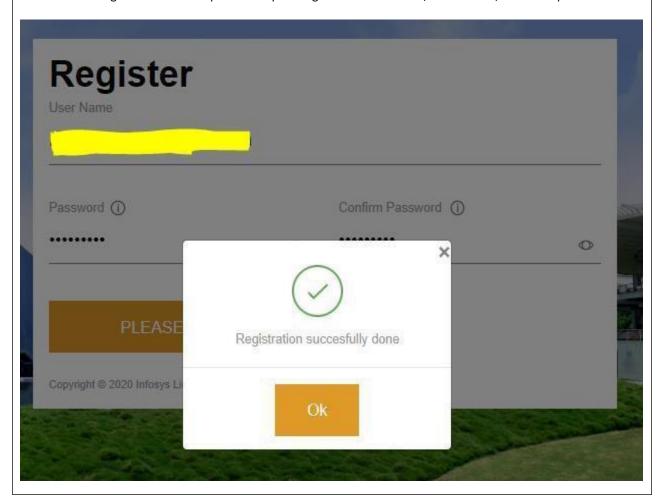
Note – a) Username should be e-mail id which will be used for login subsequently.

b) Kindly note character for creating a valid password. Password should be of minimum 8 characters in length and should have at least one uppercase, one lower case, one numeric & one special character.



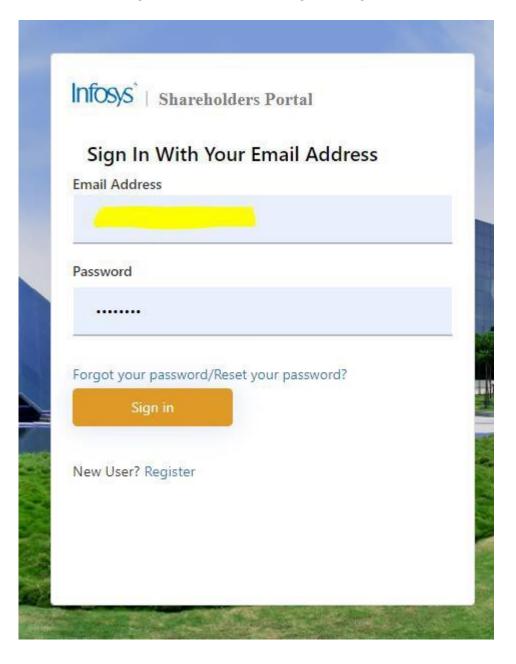
Once the email id & password is provided, shareholder should click on "REGISTER" – see above image.

After clicking Register, a message will pop-up "Registration successfully done" - see below image. It shows that shareholder is registered onto the portal for uploading various documents/declarations/other compliances.

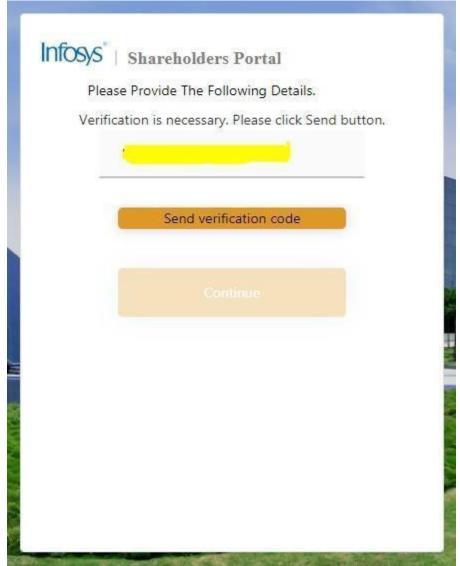


## 5. How to login into the Portal?

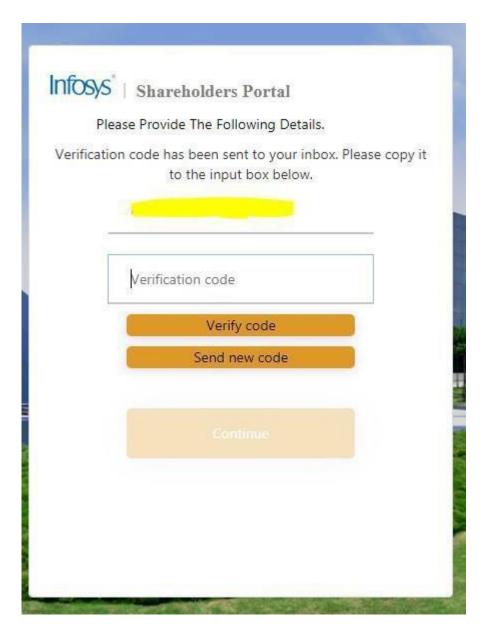
Answer: Once registration is complete, shareholder can visit the "Shareholder portal" link (Refer above point -3) and then can login (Sign in) onto the portal using the same email id & password which is used as above for registration. Below is the image showing the same:-



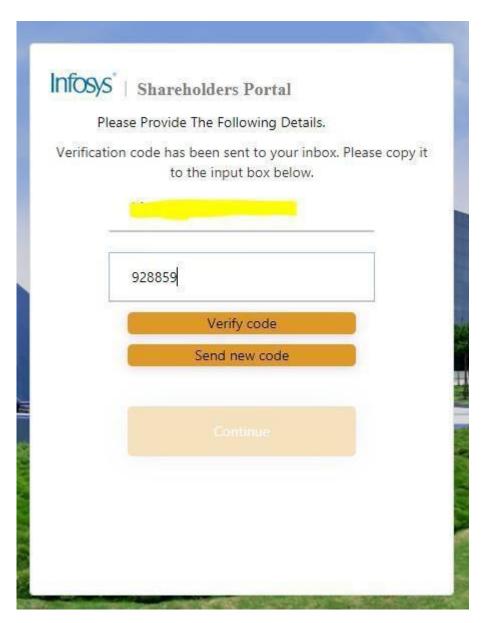
After clicking onto "Sign in ", shareholder will be directed to a new window of verification page. Shareholder should check email id shown on the verification page and click on "send verification code" (See below image).



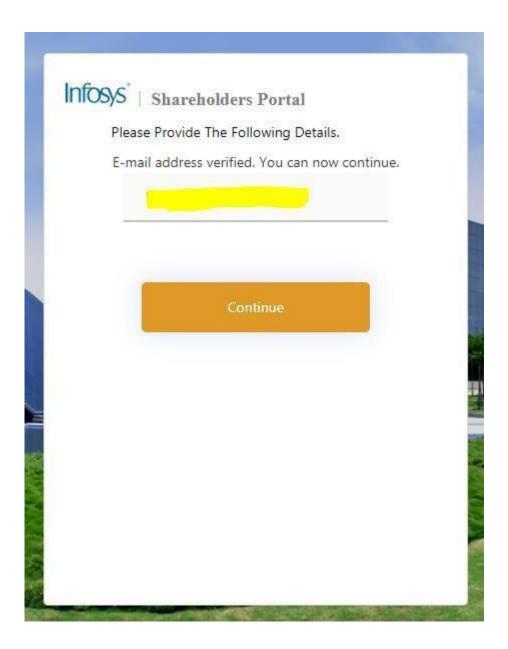
Once this is done, verification code (OTP) will be sent to the email id which is used for registration



Shareholder should check the email id for verification code (OTP) and enter that verification code (OTP) in the box (see below image). After entering the verification code (OTP), click on "verify code"



Once the, email id is verified through verification code (OTP), shareholder will be directed to a new window which says email id verified and Shareholder will be asked to continue. Please click on "Continue"



After clicking onto "Continue" as shown above, shareholder has to read **Privacy & Data Protection guidelines.** 

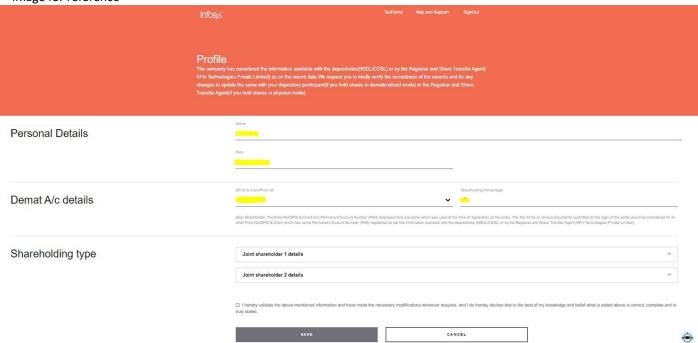
After accepting the Privacy & Data Protection Policy, a new window will appear showing profile details and relevant sections as applicable to such shareholder.

### 6. Profile Section

**Answer**: Shareholder should check their information as appearing in the profile section.

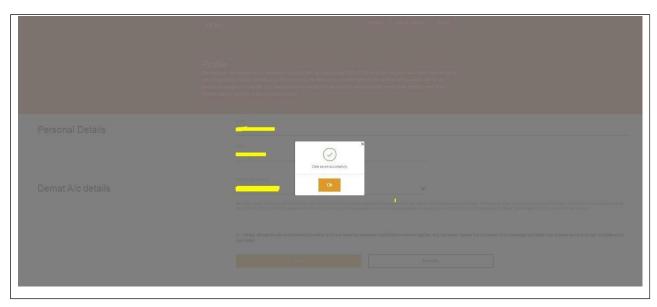
Kindly Note that the company has considered the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited) as on the record date. We request you to kindly verify the correctness of the records and for any changes, to update the same with your depository participant (if you hold shares in dematerialized mode) or the Registrar and Share Transfer Agent (if you hold shares in physical mode).

Profile information can be verified by checking the box at the bottom of profile page and clicking on "Save" button. See below image for reference —

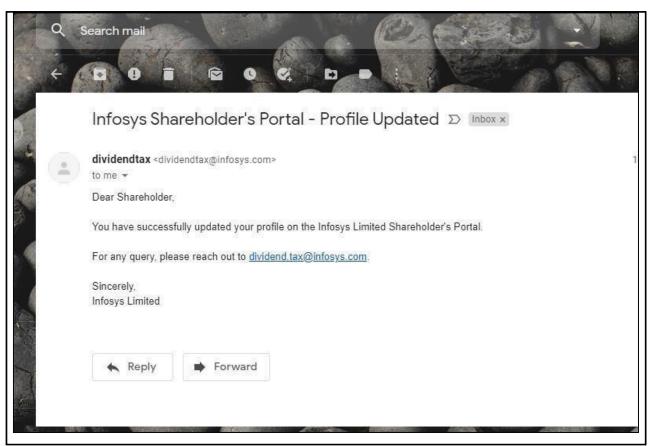


Kindly note that the Folio No/DPID & Client and Permanent Account Number (PAN) displayed in profile are same which was used at the time of registration at the portal. The Tax forms or various documents submitted at this login of the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

After verification and validation of information in the profile page and on clicking the save button, a message will appear that data saved successfully. See below image -



Parallel, a confirmation email will also be sent on the registered email id on successful updation of profile. Seebelow image-



### 7. Submission & upload of documents?

Answer: After validation of profile information, shareholder will be directed to new page where they can submit eligible documents/declarations/forms as per their legal tax status. Kindly note that the portal shall be available for the shareholder to submit the tax forms or various tax documents up to June 09,2022. No tax forms or tax documents will be considered after June 09,2022.

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Documents/declarations/Forms can be uploaded/submitted in the below section -

InfoSys\* Profile Help and Support

Dear Shareholder, Kindly note that the portal shall be available for the shareholder to submit tl

Financial Year

Dividend Cycle

Assessment Year

2023-2024

# Things to do

# Upload tax forms Lower Tax Deduction Certificate

(LTDC)

Form 15G

Form 15H

## For queries

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Please contact dividend.tax@infosys.com or on WhatsApp + 91 6366953150



SignOut

**A.** <u>Tax Documents for Resident Individual Shareholder</u> – A resident individual can submit below forms (depending on the eligibility) as appearing on the upload tax forms tab.

## A.1. Form 15G – Applicable for a Resident Individual shareholder. Below fields need to filled in

Infosys*  Form 15G Any other declaration		Profile	Help and Support	SignOut
You have successfully submitted the do	cument. If the document is found in accordance le deducting the taxes	with the	provisions of the Inco	me Tax Act,
Assessment status as per    I am assessed to tax under the Income-tax Act, 1961   Latest assessment year for which assessed				
income tax act 1961	<u> </u>			
Estimated Income For Declaration	Estimated Dividend Income For This Declaration		ed Total Income Of Sharehol al Year 2022-23	lder For
	Nature Of Income	Section	For Tax Deduction	
	Dividend	194		
etails of other Form 15G	Total Number Of Other Form 15G Filed With Other Entities		ate Income Of Other Form For The Financial Year 20	
ed with other entities				
uring the year 2022-23				
	√ I, do hereby declare that to the best is correct, complete and is truly stated. I declare the declare that to the best is correct, complete and is truly stated. I declare the declare that the declare the declared that the declared th			
	includible in the total income of any other person 1961. I further declare that the tax on my estimat referred to in this form and aggregate amount of computed in accordance with the provisions of the	under sed ed total in income/in	ctions 60 to 64 of the In come including income comes referred to in thi	come-tax Act, / incomes s form is
	ending on 31st March, 2023 relevant to the assess that my income/incomes referred to in this form a referred to in this form for the previous year ending assessment year 2023-2024 will not exceed the income as a second year and year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the income as a second year 2023-2024 will not exceed the year 2023-2	ssment ye ind the ag ng on 31s	ear 2023-2024 will be ni gregate amount of inco t March ,2023 relevant	I. I also declare me/ incomes to the
	income-tax.			

Once the above fields are filled, shareholder can verify/accept the form and submit by clicking on "submit"

Kindly note, an individual shareholder, who is a resident of India can submit Form 15G if:

- a. The person has a valid PAN
- b. Tax on estimated total income shall be **Nil** (including income for which declaration is being made and incomes for which declarations has been provided earlier to anyone for current financial year).
- c. Income for which declaration is being given and aggregate amount of incomes for which all declarations given earlier to Infosys or anyone for current financial year under form 15G shall not exceed the **maximum amount not chargeable to tax** (i.e., Rs. 2,50,000).

# A.2. Form 15H – Applicable for a Resident Individual shareholder who is of age sixty years or more at any time during FY 2022-23. Below fields need to filled in

Infosys\* Profile Help and Support SignOut
Form 15H Any other declaration

You have successfully submitted the document. If the document is found in accordance with the provisions of the Income Tax Act, 1961, the same shall be considered while deducting the taxes

Assessment status as per income tax act 1961



# Estimated Income For Declaration



Details of other Form 15H filed with other entities during the year 2022-23

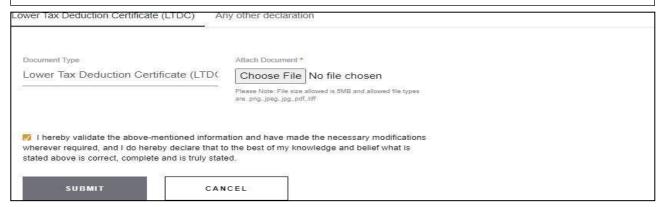


I, and do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated. I declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. I further declare that the tax on my estimated total income including income/ incomes referred to in this form and aggregate amount of income/incomes referred to in this form is computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31st March, 2023 relevant to the assessment year 2023-2024 will be nil. I also declare that my income/incomes referred to in this form and the aggregate amount of income/ incomes referred to in this form for the previous year ending on 31st March, 2023 relevant to the assessment year 2023-2024 will not exceed the maximum amount which is not chargeable to income-tax.

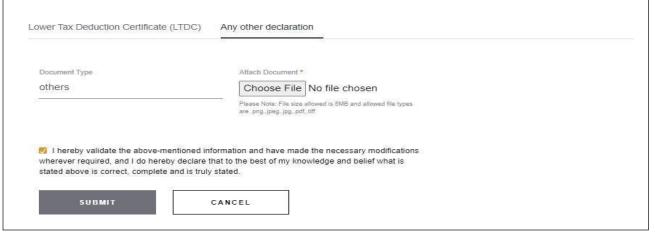
Kindly Note, an individual shareholder, who is a resident of India aged 60 years or more, can submit Form 15H if:

- a. The person has a valid PAN
- b. Tax on estimated total income shall be **Nil** (including income for which declaration is made and incomes for which declarations was provided earlier to Infosys or anyone for current financial year).
- c. The total income is after allowing deduction under Chapter VIA and / or after set off of losses under the head "House Property".

**A.4. Lower Tax Deduction Certificate (LTDC)** – Shareholder can also submit LTDC, if any, obtained from Tax authority under the tab "(LTDC)". LTDC document has to be attached under the tab "choose file". After attaching a valid LTDC, shareholder can validate the information by checking on box and submit the same by clicking on Submit.



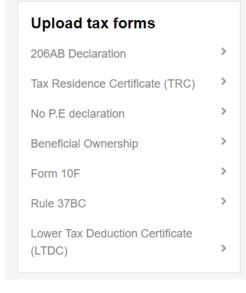
**A.3. Other document** – Shareholders can also submit any other documents (if eligible) under the tab "Any **Other declaration**" as shown below. For this, shareholder has to attach the relevant document under the tab "choose file". After attaching a valid document, shareholder can validate the information by checking on box and submit the same by clicking on Submit button. See below image –

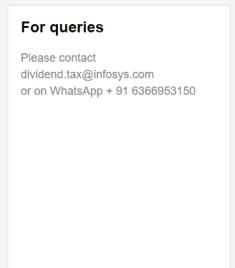


<u>B. Tax Documents for non- resident Shareholder</u> – A non-resident individual can submit below forms/documents (depending on the eligibility) as appearing into the upload tax forms

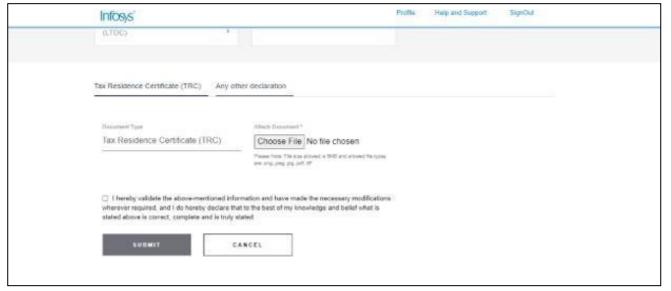
Infosys\* Profile Help and Support SignOut

# Things to do





The above tax forms, tax documents, tax declarations can be submitted by upload functionality wherein a non-resident shareholder can browse and attach the documents against the relevant tab. For e.g., to submit Tax Residency Certificate (TRC), below upload functionality can be used-

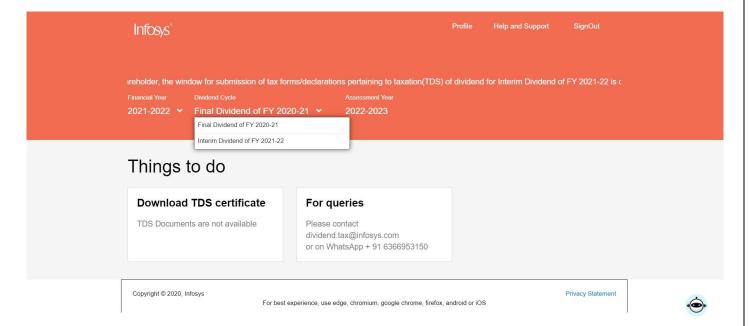


After the applicable tax forms/tax declarations are uploaded, shareholder can submit by clicking on "SUBMIT" button as shown in above image.

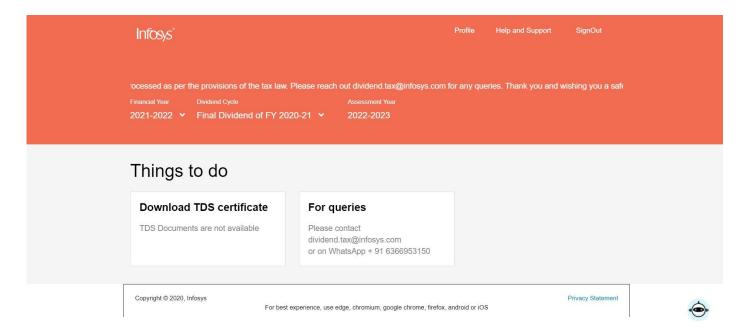
### 8. From where TDS certificate can be download or Tax credit can be viewed?

**Answer:** Shareholder for whom tax was deducted (i.e., TDS done) on payment of Final Dividend of FY 2021-22 Interim Dividend of FY 2022-23, TDS certificate can be downloaded by following below steps –

- a) Login into the Shareholder's Portal.
- b) From dropdown option in Dividend Cycle tab select "Final Dividend of FY 2021-22". See below image -



- b) after selecting "Final Dividend of FY 2021-22" from drop down, shareholder will get new box below showing "Download TDS certificate" (See below image). Certificate can be downloaded from that -
- c) Tax credit against the TDS deducted for a shareholder can also be seen in Form 26AS through TRACES or e-filing website of income tax department. A guide **(TDS Credit)** on steps to be followed to view Tax Credit can be accessed at **"Help and Support"** tab on the top of login portal of shareholders. See below image —



# 9. Support on WhatsApp

**Answer:** Shareholder can also use the WhatsApp for queries on tax on dividend. Below are the different methods to access the same-

Mobile Number	+916366953150	Add mobile number in contact list and send 'Hi' to initiate Chat.			
Scan QR Code		A user must scan this QR code to initiate WhatsApp chat. It enables them to become opted-in as well as active user.			
Click URL	https://signupforservices.com/whatsapp/optin/? bld=d364765a-7e6d-47d8-b002- 955a7e2f1557&bName=InfosysDividendTaxAssist &s=URL⟨=en_US	A user must click on this URL to initiate WhatsApp chat. It enables them to become opted-in as well as active user.			