

Lecture Plan		
Name of the college: Government College of Arts, Science & Commerce, Sanquelim, Goa		
Name of Faculty: MS.PRIYANKA THANEKAR	Subject: PERSONAL INVESTMENT AND TAX PLANNING	
Paper code: COM-234	Program: S.Y.B.SC	Division:
Academic year: 2026-27	Semester: III	Total Lectures: 45
Course Objectives: 1. To acquaint learners with basic aspects of personal investment planning. 2. To familiarize learners with basics of taxation. 3. To impart knowledge and develop skills for effective personal tax planning.		
Expected Course Outcome: 1. Understand personal investment planning. 2. Acquire knowledge and understanding the concepts of taxation. 3. Develop skills for effective personal tax planning. 4. Understand apportionment of income between spouses governed by Portuguese Civil Code u/s 5A.		
Student Learning Outcome: After completion of this course, the learners will be able to: 1. Understand personal investment planning. 2. Acquire knowledge and understanding the concepts of taxation. 3. Develop skills for effective personal tax planning. 4. Understand apportionment of income between spouses governed by Portuguese Civil Code u/s 5A.		

Month	Lecture From	Lecture To	No. of lectures allotted	Topic, Subtopic to be covered	Exercise/ Assignment	ICT Tools	Reference books
June 2026 July 2026	19/06/2026	20/06/2026	15	Unit 1: Introduction to Personal Investment Planning Introduction to investment		Power point presentation/ E-board	Agarwal O.P. (2014), Security Analysis & Investment Managements, Himalaya Publishing House, Delhi
	22/06/2026	27/06/2026		risk and return on investment, savings v/s investments			
	29/06/2026	04/07/2026		power of compounding, inflation effect on investment			
	06/07/2026	11/07/2026		setting financial goals, steps to achieve financial goals			
	13/07/2026	18/07/2026		Investment process, investment vehicles			
	20/07/2026	25/07/2026		Investment strategies		Power point presentation/	Gaur V.P., & Narang. D.B., Income Tax Law
				Unit 2: Basics of Taxation Meaning of tax, types of taxes			

August 2026	27/07/2026	01/08/2026	20	Types of taxes, concepts of Person, Previous Year, Assessment Year, Assessee, Assessment, Income, Gross Total Income		E-board	Practice, Kalyani Publications. . Hariharan. N., Income Tax Law & Practice Vijay Nicole Imprints Pvt.Ltd.
	03/08/2026	08/08/2026		Permanent Account Number (PAN), Residential status			
	10/08/2026	15/08/2026		Scope of income, heads of income			
	17/08/2026	22/08/2026		Effect of taxes on investment, Deductions under Chapter VI-A - 80C, 80CCC, 80CCD, 80D, 80TTA, 80TTB,			
Septem ber 2026	24/08/2026	29/08/2026		Computation of total income of individuals, tax rates, old & new tax regime,		Power point presentation/ E-board	Devi. K., Tax Planning Management, Bookscape
	31/08/2026	05/09/2026		Tax liability, tax calculation, types of Income Tax Returns for Individuals.			
	07/09/2026	12/09/2026		Types of Income Tax Returns for Individuals.	Casee study on Enviro nment		

October 2026			10	Unit 3: Personal Tax Planning Introduction and meaning of tax planning, objectives of tax planning	al protest s againts busien ss in India	. Dubey B.S., Tax Planning, Bookscape Lakhotia R.N. & Lakhotia S, A Guide to Tax Planning, Diamond Pocket Books Pvt Ltd, New Delhi.
	21/09/2026	26/09/2026		Objectives of tax planning, Tax saving schemes, tax evasion, tax avoidance,		
	28/09/2026	03/10/2026		Tax avoidance, difference between tax planning, tax evasion and tax avoidance,		
	05/10/2026	10/10/2026		Tax evasion and tax avoidance, apportionment of income between spouses governed by Portuguese Civil Code u/s 5A.		
	12/10/2026	14/10/2026		Apportionment of income between spouses governed by Portuguese Civil Code u/s 5A.		

*** Assessment
Rubrics**

Component	Max Marks
ISA 1	7.5
ISA 2	7.5
ISA 3	7.5

Project	
Semester	
End Exam	60