

DOCUMENT CHECKLIST

Income tax return checklist

Documents to keep ready before filing your income tax return. Share what applies to you, and we will tell you if anything else is needed.

Basic details

- ☐ PAN and Aadhaar (both linked)
- ☐ Login credentials for the income tax portal, if available
- ☐ Bank account details: all accounts held during the year, with IFSC
- ☐ Copy of last year's income tax return

Salary income

- ☐ Form 16 from each employer during the year
- ☐ Salary slips, if Form 16 is not yet available
- ☐ Rent receipts and landlord's PAN (for HRA, if not claimed through the employer)

Tax statements

- ☐ Form 26AS
- ☐ Annual Information Statement (AIS) and Taxpayer Information Summary (TIS)
- ☐ Challans for advance tax or self-assessment tax paid

Other income

- ☐ Interest certificates for savings accounts, fixed deposits and bonds
- ☐ Dividend details
- ☐ Rental income: rent received, municipal taxes paid and tenant details
- ☐ Home loan interest certificate for let-out or self-occupied property

Capital gains

- ☐ Capital gains statement from your broker for shares
- ☐ Capital gains statement for mutual funds (from CAMS / KFinTech or the fund house)
- ☐ Purchase and sale deeds for any property sold, with improvement costs
- ☐ Details of reinvestment for exemption (e.g. a new house or capital gains bonds)

Deductions (old regime)

- ☐ Section 80C: PF, PPF, ELSS, life insurance premiums, tuition fees, home loan principal
- ☐ Section 80D: health insurance premiums and preventive health check-ups
- ☐ Section 80CCD(1B): additional NPS contribution
- ☐ Section 80G: donation receipts with the donee's PAN
- ☐ Education loan interest certificate (section 80E)

Business or profession

- ☐ Bank statements for all business accounts
- ☐ Books of account, or details of income and expenses
- ☐ GST returns filed during the year
- ☐ TDS certificates (Form 16A) received from clients
- ☐ Details of assets purchased, and loans taken or given

NRIs and foreign assets

- ☐ Passport, with travel dates to work out residential status
- ☐ NRE / NRO account statements
- ☐ Details of foreign bank accounts, investments and income (for residents)
- ☐ Tax residency certificate, if claiming treaty (DTAA) benefits

Not every item applies to everyone. Share what you have and we will tell you if anything else is needed.