

Income Tax Return (ITR) Filing Checklist

Documents to keep ready before your ITR filing appointment

Identity & Basic Details

- PAN card
- Aadhaar card (linked with PAN)
- Bank account details for all active accounts (with IFSC)
- Contact details - mobile number and email registered on the e-filing portal

Income Documents

- Form 16 from employer (if salaried)
- Form 26AS and Annual Information Statement (AIS) downloaded from the portal
- Rent receipts / rent agreement (if claiming HRA)
- Interest certificates from banks/post office (savings, FD, RD)
- Capital gains statement from broker/mutual fund houses (equity, MF, property sales)
- Business/profession income - profit & loss and balance sheet, if applicable
- Details of any other income (freelance, commission, family pension, etc.)

Deduction & Exemption Proofs (Old Regime)

- Section 80C - PPF, ELSS, life insurance premium, principal repayment on home loan, tuition fees
- Section 80D - health insurance premium receipts (self, family, parents)
- Home loan interest certificate under Section 24(b)
- Section 80G - donation receipts with 80G registration number
- Section 80E - education loan interest certificate, if applicable
- NPS contribution statement (Section 80CCD)

Property & Asset Details

- Details of house property owned (self-occupied / let-out) with municipal tax paid
- Foreign asset/income details, if any (mandatory disclosure)
- Details of any property bought/sold during the year

Previous Year Reference

- Last year's filed ITR copy and acknowledgement
 - Advance tax / self-assessment tax challans paid during the year
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This checklist is a general guide and may vary based on your specific facts. Please consult us to confirm applicability before filing.