

ITR Filing Checklists

1. ITR Filing Document Checklist

- ✓ PAN Card
- ✓ Aadhaar Card
- ✓ Mobile number linked with Aadhaar
- ✓ Bank account details & IFSC
- ✓ Form 16 (if applicable)
- ✓ Form 26AS & AIS/TIS
- ✓ Investment proofs (80C, 80D, etc.)
- ✓ Interest certificates
- ✓ Home loan certificate
- ✓ Capital gains statements (if any)
- ✓ Previous year's ITR copy
- ✓ Donation receipts (if applicable)

2. Business ITR Checklist

- ✓ PAN & Aadhaar of proprietor/partners/directors
- ✓ GST Registration details
- ✓ Business bank statements
- ✓ Profit & Loss Account
- ✓ Balance Sheet
- ✓ Cash Book & Ledger
- ✓ Sales & Purchase Registers
- ✓ TDS/TCS certificates
- ✓ Loan statements
- ✓ Fixed asset details
- ✓ Depreciation schedule
- ✓ Previous year's ITR and audit report (if applicable)

3. Salaried Employee ITR Checklist

- ✓ PAN Card
- ✓ Aadhaar Card
- ✓ Form 16 from employer
- ✓ Salary slips
- ✓ Form 26AS & AIS/TIS

- ✓ Bank statements
- ✓ Interest certificates
- ✓ Investment proofs
- ✓ Health insurance premium receipts
- ✓ Home loan interest certificate
- ✓ Rent receipts/HRA documents (if applicable)
- ✓ Previous year's ITR copy

Disclaimer: This checklist is for general informational purposes only. Requirements may vary depending on the taxpayer's circumstances and applicable tax laws. Consult a qualified Chartered Accountant before filing your Income Tax Return.