

ITR Filing — Documents Checklist

Keep these ready before your income tax return filing appointment.

For Salaried Individuals

- ☐ Form 16 from employer(s)
- ☐ Bank statements for the financial year (all accounts)
- ☐ Form 26AS / Annual Information Statement (AIS)
- ☐ Investment proofs — 80C, 80D, home loan interest, etc.
- ☐ Rent receipts / HRA details, if applicable
- ☐ Previous year's ITR acknowledgement
- ☐ PAN and Aadhaar

For Business / Presumptive Income (44AD/44ADA)

- ☐ Bank statements — all business accounts, full year
- ☐ GST returns (GSTR-1, GSTR-3B) if registered
- ☐ Sales and purchase summary / Tally or accounting export
- ☐ Details of fixed assets purchased or sold
- ☐ Loan statements, if any
- ☐ Previous year's ITR and financial statements

If You Have Capital Gains

- ☐ Broker-issued Tax P&L / Capital Gains statement
- ☐ Property sale/purchase deed, if real estate involved
- ☐ Mutual fund / stock statements (holdings and transactions)

This is a general checklist for illustration — your specific requirement may vary depending on income sources and applicable schedules. We will confirm the exact list for your case at consultation.

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