

ITR Filing Document Checklist (India)

Everything you need to gather before filing your Income Tax Return — FY 2024-25 / AY 2025-26.

Identity & Basic KYC

- PAN card (linked with Aadhaar)
- Aadhaar card (mobile number linked for OTP)
- Bank account details — account no., IFSC, type (all active accounts)
- Pre-validated bank account for refund
- Contact: email ID and active mobile number

Income Proofs — Salary

- Form 16 (Part A & Part B) from every employer in the FY
- Salary slips for months not covered by Form 16
- Form 12BA — perquisites, if any
- Rent receipts + landlord PAN (for HRA above Rs 1,00,000/yr)

Income Proofs — Other Sources

- Interest certificates — savings, FD, RD from every bank
- Form 16A — TDS on interest, professional fees, commission
- Dividend statements from brokers / companies
- Rental income — rent agreement, municipal tax paid, home-loan interest certificate

Capital Gains

- Broker P&L / capital gains statement (equity, MF, F&O)
- Sale deed + purchase deed for property sold
- Improvement cost bills & indexation working
- Form 26QB / 16B for TDS on property (buyer & seller)

Business & Profession

- Books of accounts / P&L / balance sheet
- GST returns filed (GSTR-1, 3B, 9) for reconciliation
- Tax audit report (Form 3CB/3CD) if applicable

Deductions & Investments

- 80C — LIC, PPF, ELSS, principal on home loan, tuition fees
- 80D — health insurance premium (self, parents)
- 80E — education-loan interest certificate
- 80G — donation receipts with PAN of donee
- Home-loan interest & principal certificate (Sec 24 / 80C)
- NPS contribution — Sec 80CCD(1B) statement

Pre-Filing Reconciliation (must match)

- Form 26AS — TDS/TCS credits
- AIS (Annual Information Statement) — all financial transactions
- TIS (Taxpayer Information Summary) — pre-filled data
- Match every entry with your records BEFORE submitting the return

Foreign Income / Assets (if any)

- Foreign bank account statements & FA schedule details
- ESOP / RSU vesting statements & Form 67 for foreign tax credit

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