VITHAL P GUTTI & CO
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DOCUMENT CHECKLIST

Income Tax Return Filing

Tick the documents that apply to you and share them with us. You only need the sections that match your sources of income.

Client name: _____ Date: _____

Basic details (everyone)

- [ ] PAN card and Aadhaar card (PAN-Aadhaar linked)
- [ ] Mobile number and email linked to the income tax portal; portal login if available
- [ ] Bank account details for all accounts held during the year (for refund and disclosure)
- [ ] Form 26AS, Annual Information Statement (AIS) and Taxpayer Information Summary (TIS)
- [ ] Copy of last year's return and computation, if filed elsewhere

Salary and pension

- [ ] Form 16 from each employer during the year
- [ ] Salary slips, if Form 16 is not available
- [ ] Rent receipts and rental agreement, if claiming HRA
- [ ] Pension statement, if applicable

Business or profession

- [ ] Books of account, bank statements and profit and loss details for the year
- [ ] GST returns filed during the year, if registered
- [ ] Details of loans, fixed assets and closing stock
- [ ] Tax audit report, if applicable

House property

- [ ] Rent received and municipal tax paid for let-out property
- [ ] Home loan interest and principal certificate from the lender
- [ ] Address and co-owner details of each property

Capital gains

- [ ] Capital gains statement from your broker or mutual fund registrar
- [ ] Sale deed and purchase deed for property sold, with cost of improvement
- [ ] Details of reinvestment, if claiming an exemption

Other income

- [ ] Interest certificates from banks and post office (savings, FD, RD)

- [ ] Dividend statements
- [ ] Details of any foreign income or foreign assets
- [ ] Agricultural income, gifts or any other receipts

Deductions and tax paid

- [ ] Proofs of tax-saving investments and payments (insurance, PPF, ELSS, tuition fees and similar)
- [ ] Health insurance premium receipts
- [ ] Donation receipts
- [ ] Education loan interest certificate
- [ ] Advance tax and self-assessment tax challans

Not sure which regime or ITR form applies? We compare the options for you before filing.