Intellitax
Solutions

ITR document checklist

Individual income-tax return · Guided and printable

NAME _____ PAN _____ ASSESSMENT YEAR _____

Use the guided builder online to show the sections that apply, or work through the full checklist. Tick what you have and note what is missing. Requirements vary with income type, residency, deductions and the return form that applies to you — this is a general checklist, not tax advice.

01 Identity and basics

- [ ] **PAN card**
  Check that the name and date of birth match your Aadhaar and bank records.
- [ ] **Aadhaar**
  Confirm PAN–Aadhaar linkage before filing.
- [ ] **Bank account details**
  Account number, IFSC and a cancelled cheque or statement. Use an account you can validate.
- [ ] **Contact details**
  Current mobile number and email address registered with the income-tax portal.
- [ ] **Address proof**
  If you are filing for the first time or your address has changed.

02 Income documents

- [ ] **Salary documents**
  Form 16 from each employer, salary slips and any pension statements.
- [ ] **Interest certificates**
  Savings-account, fixed-deposit, recurring-deposit and post-office interest.
- [ ] **Dividend and investment income**
  Broker statements, mutual-fund statements and dividend credit details.
- [ ] **Capital gains**
  Equity, mutual-fund, property or other asset sale statements, with purchase and sale dates and costs.
- [ ] **Rental income**
  Rent agreement, rent receipts, municipal tax and home-loan interest certificates.
- [ ] **Business or professional income**
  Books, bank statements, invoices, expense records, GST returns and depreciation details.
- [ ] **Foreign income or assets**
  Statements, foreign tax paid and any relevant foreign-account details.

03 Deductions and exemptions

- [ ] Section 80C investments
  LIC, PPF, ELSS, EPF, tuition fees and home-loan principal repayment proofs.
- [ ] Health insurance — 80D
  Premium receipts and policy details for self, family and parents, where eligible.
- [ ] Home loan — interest
  Lender's interest certificate for the relevant financial year.
- [ ] Education loan — 80E
  Interest certificate from the lender.
- [ ] Donations — 80G
  Receipts with the trust or institution's registration details.
- [ ] NPS — 80CCD
  Contribution statement and employer NPS details where applicable.
- [ ] HRA exemption
  Rent receipts, rent agreement and landlord details, if you are claiming HRA.

04 Taxes already paid

- [ ] Form 26AS
  Download the latest statement from the income-tax portal and check the tax credits.
- [ ] AIS / TIS
  Review the Annual Information Statement and Taxpayer Information Summary for reported transactions.
- [ ] TDS certificates
  Form 16, Form 16A or other certificates for tax deducted at source.
- [ ] Advance tax and self-assessment tax
  Challan copies and payment dates.

05 Depending on your case

- [ ] Notice or query
  The full notice, response deadline and any earlier correspondence.
- [ ] Previous-year return
  ITR acknowledgement and computation, especially for carry-forward losses.
- [ ] Audit or accounts
  Audit report, balance sheet, profit-and-loss statement and schedules where applicable.
- [ ] Regime comparison
  Old versus new regime workings, if you want a comparison before choosing.

06 Before you submit

- [ ] **Reconcile the numbers**
  Match Form 26AS, AIS and your own records before finalising income and tax credits.
- [ ] **Check the bank account**
  Validate the bank account for the refund, if a refund is expected.
- [ ] **Review the return**
  Check personal details, income heads, deductions, tax paid and the regime selected.
- [ ] **Verify and e-verify**
  Submit the return and complete e-verification. Keep the acknowledgement.

Need help with a document or a notice?
Call +91 94453 21824 or email intellitaxsolutionsofficial@gmail.com. Office hours: Mon–Sat, 10:00–18:00.

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