ITR Filing - Document Checklist

Collect these before sitting down to file so your return matches what the department already holds.

Income

- [ ] Form 16 / Form 16A from each employer / deductor
- [ ] Bank and post-office interest certificates
- [ ] Rent receipts, rental agreements, property tax paid
- [ ] Business books, P&L;, balance sheet or turnover records
- [ ] Capital gains statements from brokers / mutual funds / property sale deeds

Tax credits and statements

- [ ] Form 26AS and Annual Information Statement (AIS) from the e-filing portal
- [ ] Challans for advance tax / self-assessment tax paid

Deductions (old regime)

- [ ] Section 80C proofs: PPF, ELSS, life insurance, tuition fees, home-loan principal
- [ ] Health insurance premium receipts (80D)
- [ ] Home-loan interest certificate
- [ ] Donation receipts (80G) with PAN of the trust

Account details

- [ ] PAN-Aadhaar linkage status
- [ ] Bank account number and IFSC for refund (must be pre-validated)
- [ ] Foreign assets / income details if any

General information only, prepared by SK Wealth Tax Advisor as of November 2026. Rules change - confirm on the official portal or with a qualified professional before acting. This is not legal or tax advice.