

# ITR FILING CHECKLIST

INFO/DOCS TO BE GATHERED PRIOR TO ITR FILING

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## GENERAL DOCUMENTS

- PAN / Aadhaar (*If registering for the first time on IT portal*)
  - Bank Account Details (*If registering for the first time on IT portal*)
  - TDS Certificates
  - Advance Tax & Self Assessment challans
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## SALARY INCOME

- Form-16 / Pension certificate / PPO
  - Rental Receipts (*To claim HRA Exemption*)
  - Travel bills (*To claim LTA Exemption*)
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## INCOME FROM HOUSE PROPERTY

- Interest certificate from the bank (*To claim 80C & 24(b) deduction on housing loan*)
  - Property details (*If House property is given on rent*)
  - Receipts of Municipal taxes (*If House property is given on rent*)
  - Form 16A (*If House property is given on rent*)
  - Bank statement or Rent agreement (*If House property is given on rent*)
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## **CAPITAL GAINS**

- Purchase and Sale deed (If Land or Building is sold)
  - Details of new investment (For claiming capital gain exemption)
  - Capital Gain statement from Broker (If Shares/MF's is sold)
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## **INCOME FROM OTHER SOURCES**

- Bank statement / Post Office savings book (Interest Income)
  - Bank statement / Demat / Broker statement (Dividend Income)
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## **DEDUCTIONS / EXEMPTIONS**

- Proof of Investment for all deductions/exemptions
  - 80D - Receipts of Medical insurance / Expenditure
  - 80G - PAN, Name and address of the Donor
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NOTES

*Note: Please ensure to file relevant ITR Forms before you file the ITR*

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