

TAX FILING CHECKLIST

Income Tax Filing Checklist (Individuals)

Gather these before your return gets prepared — it's the difference between a same-week filing and weeks of back-and-forth over missing documents.

Income documents

- Form 16 from your employer(s)
- Bank statements for the full financial year
- Interest certificates from banks / post office deposits
- Capital gains statement from your broker or mutual fund houses
- Details of any rental, freelance or other income

Deduction & exemption proofs

- Investment proofs for Section 80C (PPF, ELSS, life insurance, etc.)
- Health insurance premium receipts for Section 80D
- Home loan interest certificate, if applicable
- Rent receipts and landlord PAN, if claiming HRA
- Donation receipts for Section 80G, if applicable

Identity & reference

- PAN and Aadhaar
- Previous year's ITR acknowledgement