

## Documents required for Filing of Income Tax returns

### A. General

1. PAN card.
2. Details of operational Bank accounts - Bank name, A/c. No., IFS code, Account Type- Saving/current/Over Draft Account. The details are not required to be furnished, if the Bank account has not been operated at any time during last three years.
3. TDS certificates received (if available) [e.g. certificate of TDS deducted by bank on FDRs].
4. 26AS
5. Challans of taxes paid (Self-assessment, advance tax).
6. In case of revised return or return in response to a notice received from the Department of Income-tax, details of Original return or details of notice, as the case may be.
7. Aadhar Number, if allotted.
8. Passport Number, if available.

### B. Salary Income

9. Form 16 / Salary Certificate received from the employer.
10. Details of arrears received from the employer, if any.

### C. House Property Income

1. Address of the property.
2. Co-owner details (if property is co-owned).
3. Interest certificate issued by the bank for housing loan.
4. Name of tenant in case of let-out property.

### D. Capital Gains

1. For immovable property:
  - o Sale and Purchase deed of the property (for land/building).
  - o Details of any improvements made to the asset (land, building, etc.) such as date and amount.

2. For movable assets such as shares, securities, etc.:
  - o Summary of contract receipts for sale of securities (specifying sale and purchase value of shares and date of transactions).
  - o In case of other capital assets, dates and amounts of purchase and sale, details of expenses incurred on transfer.
3. Exemptions from capital gain:
  - o Details of re-investment made in any new capital asset such as date, amount.
  - o Details of amount deposited in Capital Gains Accounts Scheme such as date and amount of deposit.

#### **E. Other Sources**

1. Bank Passbook/Statement or interest income certificate.
2. PPF passbook for interest.
3. Dividend warrants/amount.
4. Interest certificates on bonds.
5. Accrued interest on NSC during the year.
6. Details of amount of gifts received during the year in the form of cash or in kind excluding from relatives.
7. Rent agreement for plant & machinery, building etc. given on rent (if any).
8. Details of any income from winning of lottery, horse races etc.

#### **F. Tax Savings Investments - Deductions**

1. Life and medical insurance payment receipts.
2. PPF passbook.
3. Fixed deposit receipts (eligible for section 80C).
4. Repayment certificate for housing loan.
5. Deposit receipts for senior citizen saving scheme, pension plans.
6. Tuition fees receipts.
7. Donation receipts (along with details of the done such as Name of trust, amount, PAN, address) (for section 80G).
8. Any other tax saving investment receipts/proof.

9. Interest Certificate from bank for education loan.
10. Certificate from Civil Medical Authority mentioning certain prescribed diseases and disabilities.

**G. Details of foreign income/ assets, if any**

1. Salary slips in case of salary received during foreign stay.
2. Account Statement for Foreign Bank Account.
3. Details of any Foreign Asset held such as real estate, shares, investment in any trust or institution etc.

**H. Other Documents – as may be needed on case to case basis**