

ITR Documents Checklist

Everything to keep ready before your income tax return is prepared for FY 2025-26 (AY 2026-27).

Identity and basics

- ☐ PAN card
- ☐ Aadhaar, linked to PAN
- ☐ Bank account number and IFSC for the refund
- ☐ Login credentials for the e-filing portal, if you already have them

Income proof

- ☐ Form 16 from every employer you worked with during the year
- ☐ Salary slips for months not covered by a Form 16
- ☐ Interest certificates from banks and post office
- ☐ Rent received details, along with the tenant's PAN where TDS was deducted

Reconciliation documents

- ☐ AIS — Annual Information Statement, downloaded from the portal
- ☐ TIS — Taxpayer Information Summary
- ☐ Form 26AS for TDS credits
- ☐ Bank statements for the full financial year

Investments and deductions

- ☐ 80C proofs — LIC, PPF, ELSS, principal repayment, tuition fees
- ☐ 80D — health insurance premium receipts for self and parents
- ☐ Home loan interest certificate showing principal and interest split
- ☐ 80G donation receipts with the institution's registration details
- ☐ NPS contribution statement, if claiming 80CCD(1B)

Capital gains, if applicable

- ☐ Broker capital gains statement for the full year
- ☐ Mutual fund capital gains statement or consolidated account statement
- ☐ Sale and purchase deeds for property, with dates and values

Capital gains, if applicable (continued)

- ☐ Exchange statements for virtual digital assets

Business or professional income

- ☐ Books of account, or gross receipts if declaring presumptive income
- ☐ GSTIN and turnover as filed, where registered
- ☐ Fixed asset register for depreciation
- ☐ Details of advance tax already paid

Need help with this?

Book a free consultation at mymoneynest.in/book-consultation and we will confirm the exact list for your case.