

Checklist: How to file your income-tax return (ITR)

DOCUMENTS REQUIRED

- ☐ PAN and Aadhaar (linked)
- ☐ Form 16 from your employer
- ☐ Annual Information Statement (AIS) and Taxpayer Information Summary (TIS)
- ☐ Form 26AS
- ☐ Bank interest certificates
- ☐ Capital gains statements from brokers and mutual funds
- ☐ Rent receipts and home loan interest certificate (old regime claims)
- ☐ Investment proofs for deductions (old regime)
- ☐ Bank account details for refund (pre-validated)

STEPS

- ☐ PAN-Aadhaar linked
- ☐ Form 16 received
- ☐ AIS/TIS downloaded and reconciled
- ☐ Capital gains statements collected
- ☐ Regime decided
- ☐ Self-assessment tax paid
- ☐ Return filed
- ☐ Return e-verified
- ☐ Acknowledgement (ITR-V) saved

MANDATORY LEGAL REQUIREMENTS

- Filing within due date where filing is required
- Verification within the prescribed time
- Payment of self-assessment tax before filing

RECOMMENDED PRACTICES

- Reconcile AIS a week before filing
- Keep proofs for at least eight years
- Pre-validate your bank account for refunds

Last verified: pending ArthaKara review. Information published by ArthaKara Consulting Services is intended for general educational and informational purposes. It is based on the statutory provisions and official information referenced on the respective page as of its stated verification date. Laws, rules, notifications and regulatory interpretations may change. Readers should independently verify the applicable provisions and seek professional advice before taking action. ArthaKara is an independent professional information and consulting platform and is not a government website or government-endorsed portal.