

INCOME TAX FILING CHECKLIST

DOCUMENTS TO GATHER

- ☐ PAN, Aadhaar and bank account details
- ☐ Form 16 / 16A and salary details
- ☐ Interest certificates and capital-gains statements
- ☐ Proofs for deductions (80C, 80D, home loan, etc.)
- ☐ AIS / 26AS reconciliation

BEFORE FILING

- ☐ Compare old vs new regime and choose the lower-tax option
- ☐ Reconcile income with AIS and Form 26AS
- ☐ Compute advance tax / self-assessment tax due

FILING & AFTER

- ☐ File the correct ITR form by the due date
- ☐ E-verify the return within the allowed time
- ☐ Retain records for the prescribed period