

Documents Required for filling of Income Tax Return A.Y 2023-24

BASIC DOCUMENTS (Assessee)

1. PAN Card
2. Aadhaar Card
3. Bank Statements all bank accounts **(01-04-2022 to 31-03-2023)**

For Salaried Individuals

4. Form 16 – issued by employer
5. HRA Proofs – Rent agreement, rent receipts
6. Interest Certificates: savings account, FDs, or post office
7. Investment Proofs (for deductions under 80C, 80D, etc.)
 - LIC, PPF, ELSS, NSC, Tax-saving FD
 - Medical insurance (80D)
 - Home loan principal & interest (80C & 24b)
 - Education loan (80E)
 - Donation receipts (80G)

For Self-Employed / Business Owners

8. Books of Accounts – Profit & Loss A/C, Balance Sheet
9. Bank statements (Current accounts)
10. GST Returns (if registered)

Other Income Documents (if applicable)

- Capital Gains – Sale of property, stocks, mutual funds
 - Sale/Purchase Deeds in case of property
 - Broker statements for Shares/Mutual funds
11. Rental Income – Rent receipts or rental agreement

For Property Owners (Home Loan)

- Home loan interest certificate (for deduction under section 24b)
- Principal repayment certificate (for deduction under 80C)
- Possession certificate (for under-construction properties)

Notes:

- Filling online through a Tax professional requires accurate data matching with Form 26AS & AIS.
- Ensure all incomes, deductions, and TDS credit are correctly declared to avoid notices /mismatch

Notes: Bank/Financier may ask for additional documents. Charges mentioned above may vary basis loan value & additional documents required case to case basis.

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