+91 98193 28855 · info@ihkhan.in · www.ihkhan.in

Documents Needed to File Your Income Tax Return — FY 2025-26 Checklist

Most delays in filing come from one missing statement. Use this list before you send us your papers; items marked if applicable depend on your income.

Identity and basics

☐ PAN and Aadhaar (linked)
☐ Bank account details for the refund — account number and IFSC, pre-validated on the portal
☐ Last year's return and computation, if we did not file it
☐ Income-tax portal login (or we file as your e-return intermediary)

Salary

☐ Form 16 (Parts A and B) from every employer in the year
☐ Salary slips for March and any month with arrears or bonus
☐ Form 12BA for perquisites; ESOP/RSU statements
☐ Rent receipts and the landlord's PAN for HRA (rent above ₹1 lakh a year)
☐ Regime choice — new is the default; tell us if you want the old regime

Interest, dividends and other income

☐ Interest certificates from every bank and post office (savings, FDs, RDs)
☐ Dividend statements from the demat account or mutual fund
☐ Form 26AS and the Annual Information Statement (AIS) from the portal — we reconcile every entry
☐ Rental agreements, rent received, municipal tax paid and the home-loan interest certificate

Capital gains (if applicable)

☐ Capital gains statement from each broker and mutual fund house (CAMS/KFintech consolidated statement)
☐ Property sale deed, purchase deed, improvement bills and the buyer's Form 16B for TDS
☐ Cost as on 31 January 2018 for shares bought before then (grandfathering)
☐ Crypto exchange trade reports and TDS certificates (Form 16A under section 194S)

Deductions (old regime only)

☐ PPF, ELSS, life insurance, tuition fee and home-loan principal receipts (80C)
☐ Health insurance premium receipts, preventive check-up bills (80D)
☐ NPS contribution statement (80CCD(1B))
☐ Donation receipts with the donee's PAN and Form 10BE (80G)
☐ Education-loan interest certificate (80E)

Foreign assets and income (if applicable)

☐ Foreign bank statements, foreign shares and ESOPs, overseas property — for Schedule FA (mandatory for residents)
☐ Foreign tax paid — for Form 67 and foreign tax credit
☐ Days abroad in the year, with passport stamps, if your residential status is close to the line

Before you send

- Download AIS from the portal before sending anything — it often shows interest and sale transactions people have forgotten.
- Send statements as PDFs, not screenshots; every page of a Form 16 matters.
- The due date is 31 July for ITR-1/ITR-2 and 31 August for business or professional returns without tax audit; a belated return after that costs up to ₹5,000 and loses loss carry-forward.