

SREE ASSOCIATES

ITR Document Checklist

This checklist is a practical starting point only. The exact documents, deadlines and statutory requirements depend on the taxpayer, entity, transaction and applicable law. Confirm the current position before filing or acting.

Checklist item
• PAN and Aadhaar details
• Form 16 / salary certificate, if applicable
• Bank account details and interest statements
• Capital gains statements, if applicable
• Details of rental income or other sources
• Tax-saving investment/proof details, where applicable
• Previous return / acknowledgement for reference
• Any notices, intimation or tax communications

For professional assistance, contact SREE ASSOCIATES: 9493354444 | office@sreeassociates.co