

DOCUMENTS REQUIRED FOR VARIOUS INCOME TAX RETURN
FILINGS

INCOME TAX RETURNS: ITR-1

Salaried Employee / Pensioner with Income from Other Sources:

1. PAN & Password of Income Tax Login.
2. Form-16 from employer including details of Arrears if any received.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Home Loan if any repaid during the relevant Assessment Year.
5. Details of all Bank Accounts maintained by Assessee.
6. Details of any gift received during the relevant Assessment Year: either from relatives or others.
7. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
8. Contact Details: Email-ID & Mobile Number.

INCOME TAX RETURNS: ITR-2

Salaried Employee / Pensioner with Income from Other Sources and House Property Income:

1. PAN & Password of Income Tax Login.
2. Form-16 from employer including details of Arrears if any received.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Property let-out on rent alongwith details of Tenant and amount of rent received during the year.
5. Details of Home Loan if any repaid during the relevant Assessment Year.
6. Details of all Bank Accounts maintained by Assessee.
7. Details of any gift received during the relevant Assessment Year: either from relatives or others.
8. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
9. Contact Details: Email-ID & Mobile Number.

INCOME TAX RETURNS: ITR-3

Salaried Employee / Pensioner with Income from Other Sources, House Property Income & Capital Gain:

1. PAN & Password of Income Tax Login.
2. Form-16 from employer including details of Arrears if any received.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Property let-out on rent alongwith details of Tenant and amount of rent received during the year.
5. Details of Home Loan if any repaid during the relevant Assessment Year.
6. Details of sale & purchase of Moveable & Immovable property for computation of LTCG / STCG.
7. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
8. Details of all Bank Accounts maintained by Assessee.
9. Details of any gift received during the relevant Assessment Year: either from relatives or others.
10. Contact Details: Email-ID & Mobile Number.

INCOME TAX RETURNS: ITR-4

Assessee with Professional Income and Income from Other Sources:

1. PAN & Password of Income Tax Login.
2. Details of Professional Income alongwith Profit & Loss Account and Balance Sheet – Please submit if you want to opt for 44ADA.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Home Loan if any repaid during the relevant Assessment Year.
5. Details of all Bank Accounts maintained by Assessee.
6. Details of any gift received during the relevant Assessment Year: either from relatives or others.
7. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
8. Contact Details: Email-ID & Mobile Number.

INCOME TAX RETURNS: ITR-4

Assessee with Professional Income as well as House Property and Income from Other Sources:

1. PAN & Password of Income Tax Login.
2. Details of Professional Income alongwith Profit & Loss Account and Balance Sheet – Please submit if you want to opt for 44ADA.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Home Loan if any repaid during the relevant Assessment Year.
5. Details of Property let-out on rent alongwith details of Tenant and amount of rent received during the year.
6. Details of all Bank Accounts maintained by Assessee.
7. Details of any gift received during the relevant Assessment Year: either from relatives or others.
8. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
9. Contact Details: Email-ID & Mobile Number.

INCOME TAX RETURNS: ITR-4

Assessee with Professional Income as well as House Property, Capital Gain and Income from Other Sources:

1. PAN & Password of Income Tax Login.
2. Details of Professional Income alongwith Profit & Loss Account and Balance Sheet.
3. Details of investment for deduction under Section 80C & 80D etc.
4. Details of Home Loan if any repaid during the relevant Assessment Year.
5. Details of Property let-out on rent alongwith details of Tenant and amount of rent received during the year.
6. Details of all Bank Accounts maintained by Assessee.
7. Details of any gift received during the relevant Assessment Year: either from relatives or others.
8. Details of sale & purchase of Moveable & Immovable property for computation of LTCG / STCG.
9. Dividend, Saving Bank Interest & others income shall be computed as per information available with AIS – Please provide any other income if not mentioned in AIS.
10. Contact Details: Email-ID & Mobile Number.

NOTE: FOR ALL THE ABOVE CASES:

If other than above assessee has salary / pension income; then also provide Form-16 from employer including details of Arrears if any received / Pension received during the relevant Assessment Year.

INCOME TAX RETURNS: ITR-5

NGOs' / Societies / Trust / Charitable Companies Without Income Tax Exemption Approval:

1. Balance Sheet,
2. Profit & Loss Account,
3. Income & Expenditure Account,
4. Any Statutory Report prepared by your CA.

INCOME TAX RETURNS: ITR-6

Companies registered under the Ministry of Company Affairs:

1. Balance Sheet,
2. Profit & Loss Account,
3. Company Audit Report,
4. Certificate if any for claiming deductions under Section 80.
5. Tax Audit Report wherever applicable.
6. Any other report of CA for claiming relief under the Income Tax Act, 1961.

INCOME TAX RETURNS: ITR-7

NGOs' / Societies / Trust / Charitable Companies With Income Tax Exemption Approval

1. Balance Sheet,
2. Profit & Loss Account,
3. Income & Expenditure Account,
4. Any Statutory Report prepared by your CA.

INCOME TAX RETURNS: ITR-U

Can be filed for any assessee for last two assessment years.

Documents as aforesaid for respective Income Tax Returns.