

Income Tax Return Checklist

Financial Year 2024-25

Essential documents and information needed for filing your income tax return

☐=ÜÄ Basic Documents

- PAN Card (Permanent Account Number)
- Aadhaar Card (Linked with PAN)
- Bank Account Details (IFSC, Account Number)
- Previous Year's ITR Acknowledgment (if filed)
- Personal Contact Information (Email, Phone)
- Current Address Proof (Aadhaar/Passport/Utility Bill)

☐=Ü° Income Details

- Form 16 from Employer (if salaried)
- Form 16A for TDS on Other Income
- Form 26AS (Tax Credit Statement)
- Annual Information Statement (AIS)
- Salary Slips for All Months
- Income from Other Sources (Interest, Dividends)
- Bank Statements for All Accounts
- Rental Income Details (if applicable)
- Capital Gains Statements (for shares, property)
- Business Income Records (if self-employed)

☐=Ü, Deduction Proofs

- Section 80C Investments (PPF, ELSS, NSC, etc.)
- Section 80D Health Insurance Premium Receipts
- Section 80G Donation Receipts
- Home Loan Interest Certificate (Section 24)
- Education Loan Interest Certificate (Section 80E)
- HRA Receipts and Rent Agreement (if applicable)
- NPS Contribution Receipt (Section 80CCD)
- Medical Bills for Dependent with Disability (Section 80DD)
- Electric Vehicle Loan Interest (Section 80EEB)
- Interest on Education Loan (Section 80E)

☐=ÜË Other Essentials

- Foreign Income Details (if applicable)
- Foreign Assets Information (for Schedule FA)
- Digital Signature Certificate (if required)
- Business Income & Expense Records (for professionals)
- GST Returns (for businesses)
- Property Sale/Purchase Documents (if applicable)
- Investment Portfolio Statements
- Insurance Policy Documents

📅 Important Dates

- July 31, 2024: Due date for non-audit cases
- October 31, 2024: Due date for audit cases
- December 31, 2024: Extended due date (if announced)
- March 15, 2024: Last date for advance tax payment
- June 15, 2024: First quarter advance tax due date
- September 15, 2024: Second quarter advance tax due date
- December 15, 2024: Third quarter advance tax due date

📌 Pro Tips:

1. Keep all documents organized in a separate folder
2. Maintain digital copies of all receipts and documents
3. Start collecting documents well before the filing deadline

For more information, visit: www.savvyaccountantconnect.com