

# **ITR Filing Checklist for AY 2025–26 (India)**

## **1. Personal Details**

- ☐ PAN Card
- ☐ Aadhaar Card (linked with PAN)
- ☐ Bank Account Details (Account Number + IFSC)
- ☐ Address & Contact Info
- ☐ Bank Statement (last FY)

## **2. Income Documents**

- ☐ Form 16 (from Employer)
- ☐ Salary Slips
- ☐ Form 26AS (from Income Tax Portal)
- ☐ AIS & TIS Reports (new consolidated income reports)
- ☐ Rental Income Details
- ☐ Freelance/Side Hustle Income
- ☐ Dividend/Pension/Interest Income Proof

## **3. Capital Gains (if applicable)**

- ☐ Stock/Equity Sale Reports (Short/Long-term)
- ☐ Mutual Fund Redemption Details
- ☐ Property Sale Agreement
- ☐ Crypto/Virtual Asset Trading Summary

## **4. Deductions & Exemptions (Old Regime)**



☐ Section 80C: LIC, PPF, EPF, ELSS, Tax Saving FD

☐ Section 80D: Health Insurance Premiums

☐ Section 80E: Education Loan Interest

☐ Section 80G: Donations

☐ Section 24(b): Home Loan Interest

☐ NPS Contributions (80CCD)



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## **5. Home-Related Details**

☐ Home Loan Interest Certificate

☐ HRA (Rent Receipts or Rent Agreement)

☐ Municipal Tax Paid Proof

## **6. Tax Payments**

☐ Advance Tax Paid Challans

☐ Self-Assessment Tax Receipts

☐ TDS Details (Salary, Bank, Rent)

## **7. Foreign Assets (if applicable)**

☐ Foreign Bank Accounts

☐ Foreign Investments

☐ Foreign Travel Expenses (under scrutiny)

## 8. Login & Supporting Access

- ☐ Income Tax Portal Login Credentials
- ☐ Linked Mobile Number & Email (for OTP)
- ☐ Digital Signature Certificate (DSC) if applicable
- ☐ E-verification methods ready (Aadhaar OTP / Netbanking / EVC)

## 9. Optional, but Helpful

- ☐ Previous Year's ITR Copy
- ☐ CA/Tax Consultant Notes
- ☐ Notes on Any Large Transactions or Notices



## Pro Tip Section (Add at Bottom)

- ✳ Choose **Old vs. New Tax Regime** before starting
- ✳ File before **July 31st, 2025** to avoid penalty
- ✳ Keep all receipts/documents safe for 6 years

“Need help? Read our full guide on <https://pulseupnxt.com/en/e-filing-itr-ay-2025-26-mistakes-to-avoid/>