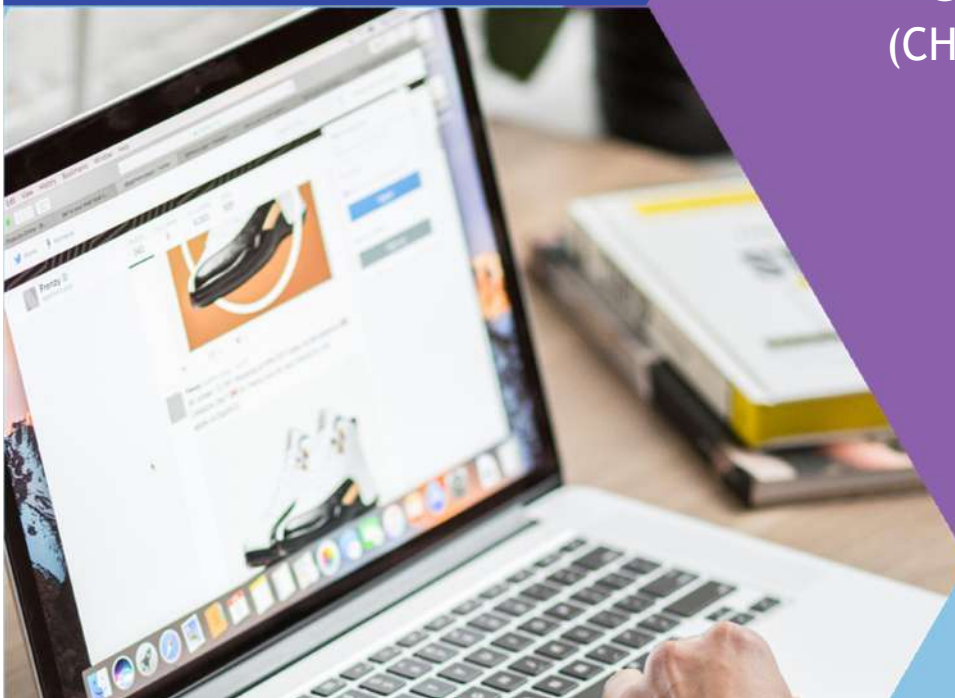




# ITR FILING CHECKLIST (A.Y. 2025-26)

Jagdish & Associates  
(CHARTERED ACCOUNTANTS)



[iihadlani@gmail.com](mailto:iihadlani@gmail.com)

# BASIC INFORMATION & DOCUMENTS

## Basic Information & Documents Required for Filing ITR

- ☒ Identity Documents - PAN & Aadhar
- ☒ Income Tax Login Credentials if already registered
- ☒ Contact Details - Mobile & Email for Income Tax Registration
- ☒ Bank Statement (Excel) - 01-04-20XX to 31-03-20XX
- ☒ All Loan Statements - 01-04-20XX to 31-03-20XX
- ☒ Interest Certificates – 20XX-XX



# WHO ARE REQUIRED TO FILE ITR

## Person who are required to ITR Compulsory

If any of the following condition is satisfied:  
(Other than Company & Firm)

- ☒ Income exceeds basic exemption limit
- ☒ Total Sales or Gross Receipt in Business is more than exceeding Rs. 60 Lacs
- ☒ Total Gross Receipts in Profession is more than exceeding Rs. 10 Lacs
- ☒ Cash Deposit of more than Rs. 1 Crore in one or more Current Accounts
- ☒ Cash Deposit of more than Rs. 50 Lacs in one or more Savings Accounts
- ☒ Total TDS or TCS deducted more than Rs. 25,000 (Rs. 50,000 for Senior Citizen)
- ☒ Incurred more than Rs. 2 Lacs in Foreign Travelling for Self or other person
- ☒ Incurred more than Rs. 1 Lacs as Electricity Expenditure



# SALARY INCOME

## Details required for Salary Income

- ☒ Form 16/Payslips for the Financial Year
- ☒ Pensioner Certificate for the Financial Year
- ☒ Details of Arrears Salary, if any for relief calculation

# HOUSE PROPERTY INCOME

## Details required for Rent Income

- ☒ Property Address
- ☒ Rent received during the year
- ☒ Home Loan Documentation
- ☒ Home Loan Statement or Interest Certificate - F.Y. 20XX-XX
- ☒ Property Tax Receipt, if paid



# CAPITAL GAIN INCOME

## Details required for Capital Gain Income

- ☒ Capital Gain Report (Shares/Mutual Fund) from Broker
- ☒ Annual Holding Statement (Shares/Mutual Fund)
- ☒ Sale Deed of Immovable Property Sold
- ☒ Purchase Deed/Valuation Report of Immovable Property Sold
- ☒ Details of Sale Expenses (In case of Immovable Property Sold)
- ☒ Details of Improvement (In case of Immovable Property Sold)
- ☒ Details of each Sale & Purchase (In case of Virtual Digital Asset)
- ☒ Details of Sales & Purchase Cost (In case of other Capital Asset)





## BUSINESSINCOME

### DetailsrequiredforBusinessIncome

- ☒ FinancialStatements(Profit&LossandBalanceSheet)
- ☒ BalancesofSundry Debtors,Creditors,Stock&Cash
- ☒ Ifbooksnotmaintained,thenDetailsofSalesduringtheyear
- ☒ Ifbusiness isregisteredunderGST, thenitscredentials

## OTHERINCOME

### DetailsrequiredforOtherIncome

- ☒ Savings&FixedDepositInterest
- ☒ Dividend,Commission,oranyotherInterestIncome
- ☒ AgricultureIncome(LanddetailsrequiredifIncome>5Lacs)
- ☒ LICPensionIncome&LICMaturity(Taxable)
- ☒ AnyotherIncomenotcoveredabove

### Connect Now for More Details

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