

EXPRESS - DOCUMENT CHECKLIST

Following is a checklist of documents which are required for filing income tax returns.

	Applicable (Yes/No)	Documents Provided (Yes/No)	Documents will be provided by (Date)
PAN Card			
Previous year IT Return (Acknowledgement)			
Previous Year Balance Sheet/ Statement of Accounts			
Salaried			
Salary Slips			
Form 16			
NRI			
Passport/ PIO/ OCI			
CDC (Mariners)			
Allotment Slips (Mariners)			
Professionals/ Businessmen			
Proof of Professional/ Business Income			
Bank Statements			
Fixed Deposits/ CD/ Bonds Details			
Interest earned certificates			
TDS Certificates			
NSC/ PPF/ Other Statements			
Mutual Fund Transaction			
Equity/ Commodity/ DEMAT Transaction			
Dividend Earned			
Real Estate			
Purchase/ Payment Details			
Sell/ Receipt Details			
Rental Income (If any)			
Loan (Interest/ Principal)			
Jewellery/ Gold			
Purchase/ Payment Details			
Sell/ Receipt Details			
Other Assets			
Purchase/ Payment Details			
Sell/ Receipt Details			
Loans (Personal/ Educational/ Others)			
Credit Card Expenses			
Large ticket purchase of assets (Car/ Bike/ TV/ Others)			

Client Name:

Contact No: