

Dear All,

**DUE DATES ARE CLOSER THAN THEY APPEAR. IT'S HIGH TIME FILE YOUR RETURN ON TIME AND FEEL RELAXED.**

The Income Tax return filing season is knocking the doors; it's time to collate all the income tax documents for the period from April 2022 to March 2023.

Please send the following docx:

**Salary Income :-**

1. Form 16 (Salary Certificates) / Salary Slip / Pension Certificate.
2. Rent Agreements / Rent receipts in case claiming HRA (House Rent allowance) deduction.
3. Any other expense details reimbursed by the employer for which claiming deduction on actual basis.

**Other Source Income :-**

1. Bank Passbook / Post Office Saving Passbook / statements and Interest Certificates.
2. Details of accrued Interest on Fixed Deposits and National Saving Certificates etc.
3. Dividend received details.
4. Details of Income received from agricultural sources.
5. Details of crypto currency transaction.

**House Property Income :-**

1. Details of rent Received or Rent agreement.
2. Interest Certificate for Home Loan Paid showing bifurcation of Interest and Principal.
3. Address of Property on which Loan paid or rent received.
4. Receipt of Municipality Tax paid (if any).
5. Detail of Pre Construction Interest.
6. Detail of Co-Owner.

**Capital Gains :-**

1. Purchase deed and Sale deed of Property sold.
2. Details of Transfer Expenses and construction expense.
3. Purchase deed or Investment details in case capital gain amount reinvested.
4. Capital gains statements or other relevant statements in case share / Securities Trading or Investments made Like Mutual fund, Future and Options downloaded or Received from Broker's Portal as "statements required for ITR Purpose."

**Business Income :-**

1. Financial statements, profit loss account, balance sheets and related schedules account of sales or purchase, receipts or payments made during the above mentioned period, expenses schedule, assets liabilities chart, investments, loans and advances, EMI schedule chart and related documents.

**Deduction from Income :-**

1. Investment made in Equity Linked Saving Scheme (ELSS), contribution made toward PPF, EPF Sukanya Samridhi Yojana, tax-saving fixed deposits, Senior Citizen Saving Scheme.
2. Receipt of Donation made.
3. Receipt of medical Insurance Premium.
4. Receipt of Education Loan repaid.
5. Any other eligible deduction.

**Other Details on case to case basis :-**

1. Any holding in companies as director or shareholding with percentage equities-opening stake, any new stake with closing stake.
2. Details of assets and Liabilities in case Total Income exceeds Rs. 50 Lakhs.

The above documents are not exhaustive, balance documents will depend on case to case basis

Pls bring and submit or mail the documents with **Subject Income tax return filing 2022-23**

Pls collate and send the documents thru a **single mail latest by 15th June 2023.**

**Team,**

**CA JATIN MINOCHA**

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