

Income Tax Return [*check list*]

Client Name: _____ A.Y. _____

Mobile No. _____ Prepared by: _____

Sr.	Clients Documents	Tick	Sr.	Working Detail	Tick
1	Previous year(s) ITR and computation <i>(Ignore if exiting client)</i>	☐	10	Verify 16A (TDS) with 26AS	☐
2	XML file and password or Security answer of income tax efilling site <i>(Ignore if exiting client)</i>	☐	11	Verify previous year ITR & Comp.	☐
3	P & L, Balance sheet and other relevant ledgers	☐	12	Verify brought forward losses	☐
4	digital signature	☐	13	Verify previous year(s) income tax refund status	☐
5	Necessary documents and deeds in case of capital gain	☐	14	Verify all deduction(s) in detail and apply effect of same in computation	☐
6	Necessary documents for deduction under chapter VI A	☐	15	Computation checked _____	
7	Various Certificates in case of TDS (16A, 16G)	☐	16	Weather the signed computation & ITR received from client <i>(Ignore if digitally Signed)</i>	☐
8	Check Head wise income		17	Filling Date _____	
8a	Salaries	☐	17	Acknowledgement No. _____	
8b	House Property	☐	18	Weather singed ITR sent to Bangalore (CPC) Date _____	☐
8c	Profit and Gain from Business & Prof.	☐	19	Any query/ observation: _____ _____ _____ _____ _____ _____ _____ _____	
8d	Capital Gain	☐			
8e	Income from Other Sources	☐			
9	<u>Other Notes:</u> _____ _____ _____ _____ _____ _____ _____ _____ _____				