



Branch office: Makardha Bus Stand,
Makardha, Domjur, Howrah

Register office: Kadamtala Bazar, Opposite of
PNB Bank, Howrah -711101

Basic Details & Documents needed for filing of ITR-2:

1. Personal Details & Documents:

1. PAN
2. Aadhar
3. Cancel Cheques of All Banks
4. Login Credentials

2. Financial Details & Documents:

1. Final Accounts for the Assessment Year [i.e. Balance Sheet, Income & Expenditure Account, Receipt & Payment Accounts, and other Books of Accounts]
2. If proper Accounts not maintain, then list Incomes with justified supporting,
3. Form 16 [Part-A & Part-B] - Certificate of Tax Deducted at Source on Salary (U/s 203 of the Income Tax Act, 1961) provided by an Employer(s) to his Employee at the end of the financial year. The Details provided in the form is Income of employee, Deductions / Exemptions and Tax Deducted at Source for the purpose of Computing Tax Payable / Refundable.
4. Form 16A – Certificate u/s 203 of the Income Tax Act, 1961 for TDS on Income other than Salary Provided by Deductor to Deductee, Form 16A is a Tax Deducted at Source (TDS) Certificate issued quarterly that captures the amount of TDS, Nature of Payments and the TDS Payments deposited with the Income Tax Department
5. Form 26AS - Provided by Income Tax Department and the Details provided in the form is Tax Deducted / Collected at Source.
6. AIS- Annual Information Statement - Provided by Income Tax Department and the Details provided in the form are,
 - Tax Deducted / Collected at Source
 - SFT Information
 - Payment of taxes
 - Demand / Refund
 - Other information (like Pending/Completed proceedings, GST Information, Information received from foreign government etc)
7. Form 10E - Form for furnishing particulars of Income for claiming relief u/s 89(1) when Salary is paid in arrears or advance. Provided by An Employee to the Income Tax Department and the Details provided in the form are Arrears / Advance Salary, Gratuity, Compensation on Termination, Commutation of Pension
8. Tax deductions specified under Chapter VIA of the Income Tax Act [Note, These deductions will not be available to a taxpayer opting for the New Tax Regime u/s 115BAC, except for deduction u/s 80CCD (2), 80CCH which will be applicable for New Tax Regime as well.] Deduction towards payments made to followings,
 - Life Insurance Premium
 - Provident Fund
 - Subscription to certain equity shares
 - Tuition Fees
 - National Savings Certificate
 - Housing Loan Principal
 - Other various items
 - Annuity plan of LIC or other insurer towards Pension Scheme
 - Pension Scheme of Central Government or National Pension Scheme (NPS)
 - Pension Scheme of Central Government, excluding deduction claimed as NPS
 - contribution made by an employer to the Pension Scheme of Central Government (Employer is a PSU or Others / Employer is Central or State Government)
 - contribution to Agnipath Scheme
 - Health Insurance Premium & Preventive Health check up (For Self / Spouse or Dependent Children / For Parents)

- maintenance or medical treatment of a Disabled Dependent or Paid / Deposited any amount under relevant approved schem. [If Taxpayer is claiming this deduction then its recommended to file form 10-IA also before filing of return. Form 10IA can be filed later also however it is recommended to file form 10-IA along with return of income to avoid any inconvenience later.]
 - Medical treatment of Self or Dependant for specified diseases
 - interest payments made on loan for higher education of Self or relative
 - interest payments made on loan taken for acquisition of residential house property where the loan is sanctioned between 1st April 2016 to 31st March 2017
 - only to individuals towards interest payments made on loan taken for acquisition of residential house property for the first time where the loan is sanctioned between 1st April 2019 to 31st March 2022 & deduction should not have been claimed in last point.
 - interest payments made on loan for purchase of Electric Vehicle where the loan is sanctioned between 1st April 2019 to 31st March 2023
 - Donations made to prescribed Funds, Charitable Institutions, etc.
 - Rent paid for house & applicable to only those who are self-employed or for whom HRA is not part of Salary, Least of the following shall be allowed as deduction [Rent paid reduced by 10% of Total Income before this deduction / ₹ 5,000 per month / 25% of Total Income (excluding long term capital gains, short term capital gains) and Form 10BA to be filled for claiming this deduction
 - Donations made for Scientific Research or Rural Development
 - Donations made to Political Party or Electoral Trust
 - interest received on saving bank accounts by Non-Senior Citizens
 - interest received on deposits by Resident Senior Citizens
 - Deductions for a resident individual taxpayer with Disability [If Taxpayer is claiming this deduction then it is recommended to file form 10-IA also before filing of return. Form 10IA can be filed later also however it is recommended to file form 10-IA along with return of income to avoid any inconvenience later.]
9. Payment made to,
 - Construction or purchase of house property
 - For Repairs of house property
 10. All Personal Bank Statements for the Financial Year
 11. EPF Statement for the Financial Year
 12. Interest Certificates from Bank or NBFC.

3. Legal Details & Documets:

1. Rent Agreement with Tenants
2. Municipal Corporation or other tax paid for Rented Properties
3. Ownership Proof of Rented Property.
4. Fair Rent of the property

4. Capital Gain Documents:

1. Capital Gain Report for the Assessment Year from Broker
2. Share Transaction Report for the Assessment Year from Broker
3. Schedule 112A ITR Format from Broker.
4. Mutual Fund Report

5. Other Documents:

1. List of Directorship
2. List of Partnership
3. List of Unlisted Equity Shares with Register

We may require other documents through the process. Those will be intimated on contact.