

*We invite you to explore the many ways TAXPOINT can help you*

**Checklist and Request Cum consent for Income Tax Return**

1	Full Name in Capital Letters	
2	Mobile Number	
3	Email ID	
4	Copy of PAN	
5	Copy of Adhar	
6	Copy of Passport	
7	Scanned image of Cheque for all bank accounts you are holding	
8	In case you are a First Year Client, Please share password for Income tax website log in. If not, Please give Last year ITR's Acknowledgement	
9	If your Total Income > 50 Lakhs, Please provide details of assets and liabilities you have as at closing date of the year for which ITR is to be filed	
10	Do you have Income from the head Salary? If yes please provide: a. Form 16 for the FY for which ITR to be filed. B. If your annual income> 50 Lakhs, please submit the details for Balance Sheet (Annexure Enclosed)	
11	Do you have income under the head House Property? If Yes, please provide: a.Address of Properties and rent earned. B. If loan is taken for that Property, Repayment certificate	
12	Do you have income under the head Business? If Yes, please provide: a. Trade Name b. Nature of business c.Books of accounts maintained, if there d. Bank statements of all bank accounts you are holding e. Constitution Certificate f. PAN of all Partners and Directors g. All assets and Liabilities you have as at closing date of the year for which ITR is to be filed (Balance Sheet Annexure is enclosed)	
13	Do you have income under the head capital gains? If Yes, please provide: a. Complete documents for purchase and sale of capital assets-Property papers+ renovation bills/demat statements/other statements with holding details B. Proof of amount invested in capital gain bonds/ other schemes to avail deduction as per Income Tax Act	
14	Do you have income under the head other sources? If yes, please provide: a. Complete details for the source and income earned.	
15	Do you have any income exempt from taxes-agricultural income? Dividend Income?	

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| 16 | Complete details of Investments done by you which are eligible as deductions as per Income Tax Act-<br>a. Copy of Life Insurance premium receipt<br>b. Copy of Health insurance premium receipt<br>c. Copy of Term plan premium receipt<br>d. Copy of School fee receipt of Children<br>e. Copy of Housing loan repayment certificate<br>f. Copy of Educational loan repayment for any children<br>g. Copy of eligible donation made during the year<br>h. Copy of Mutual Fund statements for amount invested<br>i. Copy of Tax Fixed deposits/Post office Deposits<br>j. Proof of amount invested in PPF/Kisan Vikas Patra/Sukanya Samridhhi account/Senior Citizen Saving schemes/ NSC |
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| 17 | Any other useful related information you want to share with us |
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**Declaration**

I declare that above mentioned information provided by me is true, correct and complete. I will not made you liable for any demand/notice from Income tax or any other regulatory authorities for any information provided by me which later on found to be incorrect/false or incomplete.

I also appoint you to prepare and file my Income Tax Return on my behalf and authorise you fully to represent me before tax authorities/other regulatory authorities.

(Full Name)

Signature

Date :

**TAXPOINT CONSULTING PRIVATE LIMITED**

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ANNEXURE

**Details required for Balance Sheet as at the year end for which ITR is to be filed**

LIABILITIES	Amount in Rs.	ASSETS	Amount in Rs.
<b>Capital</b>		<b>Fixed Assets</b>	
Opening Capital		Property- Residential, Commercial, Agricultural	
Current year Income		Vehicles- 2 wheeler, 4 wheeler	
		Jewellery	
		Any gift received	
<b>Secured loan</b>			
Housing Loan		<b>Current Assets</b>	
Vehicle Loan			
Educational Loan		Bank balance	
Personal Loan		Cash in hand	
		Fixed deposits with banks	
<b>Unsecured loan</b>		Investments	
From relatives			
From friends		<b>Loans and advances</b>	
From others		Any Loan given to anybody	
		Any advance given to anybody	
	-		-

(Full Name)

Signature

Date :