Income Tax Return Documents Checklist

Collect the items that apply to you before you file. The exact list depends on your income and assets, and we confirm it after a short discussion.

Personal

- ☐ CNIC (and NICOP or passport for overseas Pakistanis).
- ☐ NTN and IRIS login details, if you already have them.
- ☐ Last year’s income tax return and wealth statement.
- ☐ Mobile number and email linked to your IRIS account.

If you are salaried

- ☐ Salary certificate or payslips for the year.
- ☐ Tax deduction certificate from your employer.
- ☐ Details of allowances, bonuses and benefits.
- ☐ Provident fund and gratuity statements, if any.

If you have business or professional income

- ☐ Sales and purchase records, or accounts for the year.
- ☐ Bank statements of business accounts.
- ☐ Expense records and supporting invoices.
- ☐ Sales tax registration and returns, if registered.
- ☐ Withholding tax certificates and challans.

Property and rent

- ☐ Documents of properties owned: registry, allotment or sale deeds.
- ☐ Rental agreements and rent received during the year.
- ☐ Details of any property bought or sold during the year.

Bank, investments and other assets

- ☐ Bank statements for all accounts, including profit on deposits.
- ☐ Details of shares, mutual funds, savings certificates and other investments.
- ☐ Details of vehicles, jewellery and other significant assets.
- ☐ Loan statements and details of money lent or borrowed.

Foreign income and assets

- ☐ Details of foreign income and the tax paid on it abroad.
- ☐ Foreign bank statements and details of foreign property or investments.
- ☐ Tax residency or overseas address details, where relevant.

Credits, deductions and gifts

- ☐ Receipts for donations to approved organisations.
- ☐ Documents for any gift received, including bank transfer evidence.
- ☐ Education, pension fund or other contributions you plan to claim, with receipts.

Want us to file your return? Send your documents on WhatsApp at +92 300 3395255 or by email to consultant@tanweerhabib.com. See www.tanweerhabib.com/services/income-tax-return-filing-karachi/

This checklist is general information and is not legal or tax advice.