

## Checklist for

### **(FILING PERSONAL INCOME TAX RETURN)**

This checklist is for prepared to assess the requirements of the client.

#### **Assessment Due: 2020-21**

#### **List of required documents are given below:**

1. E-TIN certificate
2. Last Tax return ( Income Year: 2018-19, AY: 2019-20), tax clearance certificate and acknowledgement slip
3. Salary Certificate or evidence of annual income of income year 2019-20
4. Tax deduction document or certificate
5. All bank statements- Period July'19 to June'20
6. Investment related document (i.e. monthly DPS statement, contribution to approved Provident Fund (both by the employee and employer), any sum invested in Bangladesh Government Treasury Bond, ICB unit fund investment, mutual fund investment, Life Insurance, Share of Listed Companies and Private Companies.
7. Declaration of Total Family Expenses for Income Year: 2019-20
8. Certificate of any Loan received from Bank /House Building/ Financial Institution for repairing or acquiring/construction of new home/Apartment for the period from July'19 to June'20
9. Acquisition or sold of any Car/Motor Vehicles and Tax Payment against thereon. (If any)
10. Acquisition of any household goods (i.e. Furniture & Fixture, Ornaments and any other Electrical Goods). (If any)
11. Investment in Agricultural Land and Income from Agriculture. (If any)
12. If inherited Gift/property Taken/Given.(Declared Value) (If any)
13. Declaration of Total Income including Capital Gain, Interest on Securities, Income from House Property and any other Income of the assesses.

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