



Accountants | Advisors | Growth Partners

Self-Assessment Tax Return Checklist

Income

Employment



For each job you held during the tax year, please provide the following:

- **P60** – issued at the end of the tax year showing your total pay, tax, and any student loan deductions
- **P45** – issued if you left a job during the year (please also include payslips if available)
- **P11D** – issued after the tax year for any benefits not included in your payslips (e.g. **company car, private medical insurance**)

If you had more than one job, you may receive multiple **P60s, P45s, or P11Ds.**



Rental Property



If you receive rental income, please provide:

- Property details (new clients only) – purchase date, price, and any major costs (e.g. legal fees, improvements, periods lived in or let, whether furnished or unfurnished)
- Rental income received during the tax year, including letting agent statements if applicable

Expenses relating to the property, such as:

- Repairs and maintenance
- Insurance, service charges, and ground rent
- Letting agent or management fees
- Utilities paid
- Travel costs (e.g. mileage)
- Advertising or other rental-related costs
- Mortgage interest statement for the year
- (showing the interest charged – available from your lender)
- Property sale details (if applicable) – sale date, sale price, and associated costs (e.g. legal and agent fees)



Sole Trade Business



If you operate a sole trade business, we should have already discussed how to maintain your records.

Online bookkeeping software – Please notify us once your records are up to date and ready for review.

Spreadsheets – If you maintain records using a spreadsheet, please email us the file covering the relevant period. If you have a sole trade business, we should have discussed with you how to keep your records.



Bank Interest



Please provide details of any bank interest received during the tax year. This is typically shown on your bank statements or annual interest summary.

Please note, you do not need to include interest from tax-exempt sources, including:

- Cash ISAs
- Premium Bonds
- NS&I tax-free savings products



Dividends



If you hold personal investments that are not contained within an ISA, then you should provide us with the dividend vouchers for the tax year.

If you are a director of a Limited company and we complete your company accounts, then we will review your dividends as part of our accounts service, so you do not need to provide us with details of these.



Pensions Received



State pensions - these are paid on a 4-weekly basis. HMRC will normally send a letter annually explaining how much the pension is increasing to.

You will need to provide us with this document or bank statements which show the payment figures for a 4-week period during the year.

Private pensions - you should receive a P60 for this income which we will need.



State Benefits



- **Jobseeker's allowance** - is a benefit for people who are actively looking for work
- **Maternity allowance**

You can claim maternity allowance as soon as you've been pregnant for 26 weeks. Payments can start 11 weeks before your baby is due.



Other Income



- **Capital Gains** – If you sold any assets (e.g. shares or property), please provide details of the sale, including dates, values, purchase cost, and any associated expenses
- **Foreign Income** – If you are UK resident, please provide details of any overseas income received, along with any foreign tax paid
- **Other Income** – Please let us know if you have any additional income not covered above



Partnership Income



If you receive income from a partnership, please provide details of your share of partnership income for the tax year, together with your partnership statement (SA800 or equivalent).

We will also require details of how profits have been allocated, including any changes to your profit share during the year, as well as the dates you joined or left the partnership, if applicable.

If relevant, please also include details of any drawings taken during the year.



Trusts Income



If you have received income from a trust, please provide details of the income received during the tax year, together with any supporting documentation (such as R185 certificates or statements from the trustees).

We will also require details of any tax deducted at source, as well as the type of income received (e.g. interest, dividends, or other distributions).

If you have received any capital distributions or benefits from a trust, please provide full details so we can determine the correct tax treatment.



Student Loan



If you have a student loan, please confirm your repayment plan type (e.g. Plan 1, Plan 2, Plan 4, or Postgraduate).

Where possible, please also provide details of any repayments made during the tax year, including amounts deducted through PAYE or made directly.

This information allows us to ensure the correct repayments are reflected in your tax return.

Reliefs



Job Expenses



If you personally incur costs relating to your employment, you may be able to claim tax relief. Common examples include:

- Mileage – If you use your own vehicle for work and are reimbursed less than HMRC rates, please provide details of business miles travelled and the rate paid by your employer
- Uniforms & Work Clothing – Relief may be available where a specific uniform or dress code is required (everyday clothing such as suits is not allowable)
- Professional Subscriptions – If you are required to hold a professional membership that is not reimbursed by your employer, please provide details and proof of payment



Pensions Contributions



If you make pension contributions, please provide the following details where applicable:

- Personal pensions – Provider name, policy number, and contributions made during the tax year
- Workplace pensions – Contributions are usually dealt with automatically through payroll
- If contributions are made after tax (relief at source), we may be able to claim additional relief
- If contributions are made before tax (net pay), full tax relief is typically already applied

If you are unsure which arrangement applies, please provide a recent payslip and we can advise.



SEIS/EIS



If you invested in an Enterprise Investment Scheme (EIS/SEIS) then you will probably be able to receive tax relief. You should receive a certificate from HMRC (form SEIS3) for each investment and will need to pass this on to us.

We may require further details about the investment but will discuss this on a case by case basis.

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We may require further details about the investment but will discuss this on a case by case basis.



Charitable Donations



If you made donations to a qualifying charity and claimed gift aid, then you may be able to claim additional tax relief (if you are a higher rate taxpayer).

We need the following details (a good tip is to login to your just giving account and print out your past donations).



Capital Gains



If you sold any assets during the tax year, please provide details of the sale, including dates, values, purchase cost, and any associated expenses.

We will ensure your available Capital Gains Tax annual exemption is applied where applicable.