**Self Assessment Tax Return Checklist**

This checklist is intended to help you gather all necessary information for completing your Self Assessment tax return. If you have any questions about specific items or require assistance, please don't hesitate to get in touch.

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<u>**Income Sources**</u>

**1. Employment Income**

- P60, P45, or payslips.
- Details of benefits in kind (e.g., company car, private health insurance – P11D form).

**2. Self-Employment Income**

- Turnover (total sales or receipts).
- Breakdown of business expenses.
- Records of any grants or COVID-19 support received (e.g., SEISS).

**3. Property Income**

- Rental income and associated expenses.
- Details of income split for jointly owned properties.

**4. Savings and Investments**

- Bank interest received (gross amount).
- Dividend income (including dividend vouchers).

**5. Pensions and State Benefits**

- State Pension income (including deferrals).
- Private pension income (P60 or P45 from the pension provider).
- Details of Jobseeker's Allowance, Employment and Support Allowance, or other state benefits received.

**6. Capital Gains**

- Details of any property, shares, or other assets sold.
- Acquisition and disposal costs, plus any allowable expenses.

**7. Other Income**

- Foreign income and taxes paid.
- Trust income.
- Lump sums or redundancy payments.
- Income from freelance, casual, or part-time work.

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**Expenses and Deductions**

**1. Employment Expenses**

- Professional subscriptions or trade union fees.
- Mileage and travel costs (if not reimbursed by employer).
- Uniform and tools (if not reimbursed).

**2. Self-Employment Expenses**

- Office costs (e.g., stationery, phone, internet).
- Travel and subsistence.
- Marketing and advertising.
- Professional fees (e.g., accounting or legal).

**3. Rental Property Expenses**

- Repairs and maintenance.
- Property management fees.
- Mortgage interest (subject to current restrictions).

**4. Pension Contributions**

- Personal pension contributions made during the year.

**5. Charitable Donations**

- Gift Aid donations to UK charities.

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**Other Information**

**1. Marriage Allowance Transfer**

- Details if transferring or receiving unused personal allowance.

**2. Child Benefit**

- High Income Child Benefit Charge details if applicable.

**3. Student Loan Repayments**

- Plan type and repayment details.

**4. National Insurance Contributions**

- Class 2 NIC for self-employed individuals.

**5. Other Adjustments**

- Overpaid or underpaid tax from previous years.
- Relief claims (e.g., on trading losses)