



# SELF ASSESSMENT

## Tax Return Checklist



Before you begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you, and make sure you have gathered all your slips, receipts, and tax documentation. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder.

### BASIC INFORMATION

Full name

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DOB

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NI number

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NI number

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Contact details

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Address

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## GENERAL

- Yes  No The latest HMRC Self Assessment Tax Statement of Account, if you received one.
- Yes  No Any change in your marital status?

## ADDITIONAL INFORMATION

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## INCOME

- Yes  No **EMPLOYMENT INCOME**  
Form P60, P45, copy of P11D. Details of any taxable lump sums; fixed deductions from employment, redundancy payments and any student loan deductions.
- Yes  No Are you a director or office holder?
- Yes  No **SELF-EMPLOYMENT & PARTNERSHIP:** Accounting paperwork for your Accounting Period that ended in this tax year. Details of income and expenses arising or business accounts together with a note of any capital additions or disposals.
- Yes  No **CIS SUBCONTRACTOR:** All tax statements from Contractors between 6th April and 5th April in addition to Self Employment records.
- Yes  No **PENSIONS:** State Pension, private pensions and overseas pensions received, during the tax year.
- Yes  No **BENEFITS**  
State benefits or allowances received, during the tax year. Jobseekers allowance
- Yes  No Child Benefit received by you or your partner (including any paid to someone else for a child, that lives with you), the number of children this was applicable to and your partners income and the date it ceased, if applicable.





## CAPITAL TRANSACTIONS

- Yes  No **SHARES AND SECURITIES:** Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.
- Yes  No **SHARE OPTIONS:** Documentation for options granted or exercised.
- Yes  No **CHARGEABLE ASSETS:** Full details of the cost/sale proceeds for any other assets. Whether in the UK or overseas.
- Yes  No **LIFE ASSURANCE INVESTMENT BONDS:** All relevant certificates.

### ADDITIONAL INFORMATION

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## OUTGOINGS

- Yes  No **PROFESSIONAL SUBSCRIPTIONS:** Subscriptions paid to professional bodies or trade associations. Any other allowances or deductions.
- Yes  No **PENSIONS:** Details of all payments to pensions including any statements.
- Yes  No **GIFT AID DONATIONS:** Details of payments made under the gift aid scheme.
- Yes  No **EIS/SEIS & VCT:** Details of subscriptions to the Enterprise Investment Scheme or SEED EIS or Venture Capital Trust. Copy of any forms EIS3 received.
- Yes  No **INHERITANCE TAX:** Details of all gifts made over £250, including name of recipient.

### ADDITIONAL INFORMATION

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## OTHER RELIEFS

Yes  No

### SHARES AND SECURITIES

Qualifying maintenance paid to a former spouse or civil partner

Yes  No

Post-cessation expenses, pre-incorporation losses, losses on relevant discounted securities

## ADDITIONAL INFORMATION

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*For Accountancy Firms*

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or call us on 0845-838-2452