



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

DOB

NI number

NI number

UTR

Contact details

Address



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



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.



INCOME

Yes No

INCOME FROM PROPERTY: Details of any rental income, rental statements and mortgage statements for the tax year including interest paid.

Yes No

BANK/BUILDING SOCIETY ACCOUNTS: Interest received on any accounts from statements or certificates of interest received from your bank. Please indicate any Joint Accounts and enter your share of the income (include any interest received from PPI repayments).

Yes No

UK DIVIDENDS: Dividend vouchers and scrip dividend vouchers (where shares received in lieu of whole or part of dividend). Details of all UK shares held.

Yes No

FOREIGN INCOME

Interest received on any foreign accounts. Dividend vouchers from any foreign holdings, details of all foreign shares held (amounts in Sterling).

Yes No

Foreign employment payslips covering the tax year. Details & dates overseas.

Yes No

Any other received or remitted income from overseas.

Yes No

LIFE INSURANCE POLICIES: Income from insurance policies or deceased persons estates.

Yes No

OTHER SOURCES: Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.

ADDITIONAL INFORMATION



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



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



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

Tax? Relax!

Find out how QXAS can help take the stress out of this tax season

GET IN TOUCH >

Email us at qxas@qxglobalgroup.com
or call us on +44 208-146-0808



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