



## Self assessment checklist from F & F Business Strategies Ltd

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We specialise in supporting small businesses who want more than just number crunching, but want insight, simplicity, and strategic growth. Our approach is practical and proactive. From annual accounts and tax planning to business plan and business advisory, we help you stay compliant while building confidence in your business decisions.

### Self Assessment Tax Return Checklist

#### Personal Details

- ☐ National Insurance number
- ☐ Unique Taxpayer Reference (UTR)
- ☐ Government Gateway login details (if filing online)
- ☐ Bank account details (for refund/direct debit payments)

#### Income Records

- ☐ P60 from your employer (end of year summary)
- ☐ P45 if you left a job during the tax year
- ☐ P11D (benefits/expenses from employer)
- ☐ Self-employment income records (invoices, receipts, bank statements)
- ☐ Partnership statements (if applicable)
- ☐ Property rental income statements (rent received, expenses, mortgage interest)
- ☐ Dividend vouchers from shares
- ☐ Bank and building society interest certificates
- ☐ Foreign income (employment, pensions, dividends, interest, rental, etc.)
- ☐ Trusts, settlements, or estate income statements
- ☐ Capital gains records (sale of shares, property, crypto, etc.)

This is a basic guide prepared by *F & F Business Strategies Ltd*. It should not be used as a definitive guide, since individual circumstances may vary. Specific advice should be obtained, where necessary.

### Allowable Expenses & Deductions

- ☐ Self employed business expenses (travel, office, equipment, subscriptions, etc.)
- ☐ Property letting expenses (repairs, insurance, agent fees, etc.)
- ☐ Professional subscriptions or union fees
- ☐ Pension contributions (if not via PAYE)
- ☐ Gift Aid donations to charity
- ☐ Investment-related costs (financial advice, management fees)

### Other Information

- ☐ Pension income (private or state)
- ☐ Student loan repayment details
- ☐ Child Benefit received (if income over £60,000 → High Income Child Benefit Charge)
- ☐ Marriage allowance claim details (if applicable)
- ☐ Other allowances or reliefs you may be entitled to claim

### Deadlines to Remember

- ☐ Paper return deadline: 31 October (following tax year)
- ☐ Online return deadline: 31 January (following tax year)
- ☐ Tax payment deadlines: 31 January (balancing payment & first payment on account), 31 July (second payment on account)