

This is a guide as to what is needed to prepare a Self-assessment Return

We may need some additional information to compile your self-assessment for example information regarding any student loans, charitable gifts and Child Benefit.

This is for general guidance only please contact us on 01296 738668 for further information

Paid Employment

An employee, director, office holder or agency worker

We require all information about payments, expenses and benefits relating to this

Forms and Documents

Final Payslip

Self-Employment

Have worked for yourself (on your 'own account 'or in self-employment).

We require all information about payments, expenses and benefits relating to this

Forms and Documents

P & L, balance sheet

Partnership

Were in a business partnership.

We require all information about payments, expenses and benefits relating to the business

Forms and Documents

P & L, balance sheet

UK Property/ land

Received any income from UK UK property (including rents) and other UK income from land you own or lease out.

We require all information about rental income and any related expense.

Forms and Documents

Estate Agent statement and invoices

UK Pensions

UK Pensions, annuities and other state benefits received:

State Pension- amount you were entitled to receive in the year, or the weekly or 4 weekly amounts.

Tax taken off the above.

Pensions (other than state Pension), retirement annuities and taxable triviality payments- the gross amount.

State Pension lump sum- the gross of any lump

Tax taken off the above.

Jobseeker's allowance.

Total of any other taxable state Pensions and benefits.

Have you paid into a private Pension.

We require of any pensions, annuities and other state benefits received. Details of payments made into a private pension.

Investment Income

Interest and dividends from UK bank, building societies etc.

Taxed UK interest.

Untaxed UK interest.

Dividends from UK Companies.

Other dividends.

Foreign dividends (up to £300) the amount in sterling after foreign tax was taken off.

Tax taken off foreign dividends.

We require all figures relating to interest and dividends.

Capital Gains

If you sold or disposed of any assets (including, for example, stocks, shares, land and property except your private principal residence, a business) or had any chargeable gains.

We require all information about any assets sold or disposed of.

Forms and Documents

P60's and Bank statements.

Forms and Documents

Bank/Building Society certificates,

Dividend vouchers

Other UK Income

Not included on the supplementary pages:

Other taxable income- before expenses and tax taken off.

Total amount of allowable expenses.

Any tax taken off other taxable income.

Benefit from pre-owned assets.

Description of other taxable income.

We require details of any other UK Income.

Charitable Giving

Gift Aid payments made in the year.

Total of any 'one-off' payments.

Value of qualifying shares or securities gifted to charity

Value of qualifying land and buildings gifted to charity.

Value of qualifying investments gifted to non-UK charities.

Gift Aid payments to non-UK charities.

We require details of any Gift Aid payments you have made.

Student Loan Repayments

If your employer has deducted student loan repayments.

If you think your loan may be fully repaid within the 2 years.

We require details of any student loans.

High Income Child Benefit

If your Income was over £50,000 and you or your partner (if you have one) were entitled to receive Child Benefit (this also applies if someone else claims child benefit for a child that lives with you and pays you or your partner for the child's upkeep), and couples only- your income was higher than your partner's.

We require details of any child benefit received.

