



Robertson's Tax & Accounting Services

Making your accounts less taxing



Self Assessment Tax Return Checklist

What You Need to Gather Before We Can File

Filing your Self Assessment tax return doesn't have to be stressful — but it does require the right information.

Use this checklist to make sure you have everything ready. If you're unsure about anything, we're always happy to help.

Personal Information

- Your National Insurance number
- Your Unique Taxpayer Reference (UTR)
- Current address and postcode
- Date of birth
- Government Gateway login details (if you have them)

Employment Income (If You're Employed)

- P60 (end of year certificate)
- P45 (if you changed jobs during the year)
- P11D (benefits in kind – company car, medical insurance etc.)
- Details of any taxable expenses or reimbursements

Self-Employment / Sole Trader Income

- Summary of total income for the tax year
- Breakdown of business expenses
- Details of any business assets purchased (equipment, vehicles, tools)
- Mileage records (if claiming vehicle expenses)
- CIS statements (if you work in construction)

Rental Income

- Total rental income received
- Letting agent statements (if applicable)
- Mortgage interest statements
- Repairs and maintenance costs
- Insurance and service charge costs
- Details of any property purchases or sales

Dividend & Investment Income

- Dividend vouchers or statements
- Interest received from bank accounts
- Investment account statements
- Details of any shares or investments sold
- Crypto transaction summaries (if applicable)

Pension & State Benefits

- Private pension income statements
- State Pension confirmation
- Taxable benefits received
- Pension contribution details

Other Income

- Capital gains (property, shares, crypto)
- Foreign income
- Trust income
- Casual income / side hustles

Payments & Reliefs

- Gift Aid donations
- Pension contributions
- Student loan repayments
- Child Benefit received (if income over £50,000)
- Payments on account already made

Previous Year Information

- Last year's tax return (if not prepared by us)
- Details of any HMRC correspondence
- Any tax refunds or adjustments

Not Sure If You Need to Declare Something?

If in doubt — tell us.

It's always better to include too much information than miss something that could trigger a penalty later.

Ready to Get Started?

Book a 15-minute discovery call and we'll let you know exactly what applies to you.
