

**SELF-ASSESSMENT CHECKLIST 2017/18**  
**(Deadline for submission is 31 January 2019)**



Here's a list of income and expenditure to consider for your self-assessment tax return. We've also listed the documents you should keep to support your return.

**Employment(s) [all employments in the year]**

1. Salary and tax paid  
P60 or P45 showing gross salary, tax deducted and student loan deductions
2. Benefits and expenses  
Employer's P11D showing all taxable and other benefits

**Pension Income**

1. Occupational  
P60 or Certificate of Pension paid
2. State pension  
Pension received and 2017/18 notification letter
3. Other taxable benefits  
Amounts received including taxable lump sums

**Self-Employment/Partnership**

1. Business profits/losses  
Business records
2. Partnership interest income and tax deducted  
Other partnership income

**Investment Income [include your share of income from joint accounts]**

1. Dividends from UK companies/unit trusts including shares/units in lieu of dividends  
Dividend/distribution vouchers showing dividend received, date and tax credit
2. Income from trusts, settlements, Deeds of Covenant and estates  
R185 or certificates of income and tax deducted
3. National Savings interest received gross  
Statements of interest received
4. Interest from banks or building societies, received gross  
Statements of interest received
5. Income from property  
All income and expenditure, including mortgage interest statements
6. Overseas income - dividends and other income  
Dividend vouchers and documentary evidence of other income

### **Other Income**

1. Monies withdrawn from life assurance policies/bonds  
Chargeable Event Certificate from life assurance company

### **Outgoings**

1. Employment expenses  
A list of tax deductible expenses e.g. professional subscriptions, travelling expenses  
Pension contributions paid by you  
Payments made (dates, amounts, policy details) and copy documentation
2. Qualifying loans and mortgages  
Lender's statements showing interest paid and tax relief given
3. Gift Aid or Deed of Covenant payments  
Gift Aid payments (charity, date and amount) and covenant details
4. Student Loan repayments  
Payments made (amounts and dates) and copy statement showing balance at 5 April 2018
5. Other payments qualifying for tax relief  
Payee, amount, date of payment and reason/description

### **Capital Transactions (please provide any relevant documentation)**

1. Disposal of only or main residence if partly used for business or over half hectare of ground
2. Disposals where gains exceed £11,700
3. Capital losses to be claimed
4. Shares/securities bought, sold or take-overs (company name, dates and amounts)
5. Share options
6. Property acquisitions and disposals
7. Other chargeable disposals, e.g. personal property/effects worth over £11,700