

**SELF-ASSESSMENT CHECKLIST 2018/19**  
**(Deadline for submission is 31 January 2020)**



Here's a list of income and expenditure to consider for your self-assessment tax return for the tax year 6 April 2018 to 5 April 2019.

*We've also listed the documents you should keep to support your return.*

**Employment(s) [all employments in the tax 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 2018/19 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 and date*

**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 rental**

*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 Monies withdrawn from life assurance policies/bonds**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 2019*

### **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