

SELF-ASSESSMENT CHECKLIST 2023/24
(Deadline for submission is 31 January 2025)



Here's a list of income and expenditure to consider for your self-assessment tax return for the tax year 6 April 2023 to 5 April 2024.

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 and Benefit Income

1. Occupational/personal pension

P60 or Certificate of Pension paid

2. State pension

Pension received and 2023/24 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

3. 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 Monies withdrawn from life assurance policies/bonds**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 2024

- 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 grounds (including buildings) are over 5,000 square metres (just over an acre) in total
2. Disposals where gains exceed £6,000
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 £6,000.