

## Self Assessment Checklist

- Form P60 showing your salary and tax deducted in respect of any employment;
- a copy of Form P11D showing benefits in kind provided to you in connection with your employment during the year;
- any PAYE coding notices received in the year;
- the amount of state pension received in the year, together with the current rate of payment;
- details of other pensions received in the year;
- details of any Student Loan;
- details of rents received and expenses in respect of any let properties;
- details of interest received from bank and building society accounts;
- dividend counterfoils and similar vouchers for fixed interest stocks;
- chargeable event certificates on certain bonds and life assurance policies;
- marriage transfer allowance;
- details of child benefit received by yourself or your partner and any changes to your relationship status;
- Forms R185/R185 (Trust Income) showing your income and tax deducted in respect of any settlement of which you are a beneficiary;
- details of any other income arising during the year (including foreign income);
- certificate of interest paid in respect of any other loan on which you obtain, or a new loan which you consider that you may be entitled to, tax relief, with details of the purpose of any new loan;
- details of pension contributions paid in the year (including any paid by an employer on your behalf) and details of the pension scheme in question;
- details of payments under Gift Aid during the year;
- details of assets purchased or sold in the year;
- details of any gifts made where you have retained an interest in the asset or where you will derive a benefit from the asset;
- details of any interest acquired in an asset that you wholly or partly funded at any time after 17 March 1986; and
- details of any other transactions which may affect your tax liability.

The above list covers the majority of items which may be taxable, or on which you may receive tax relief. It is unlikely that all the above items will be applicable to you, but it is also possible that there may be items that are not on the list which should be disclosed to HM Revenue & Customs on your tax return. If in doubt, please contact us.

Please also remember to update us if your marital status or residential address changes.