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Self-assessment tax checklist



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B E F O R E Y O U F I L E

self-assessment checklist

Personal details

UTR (Unique Taxpayer Reference): ☐
National Insurance number: ☐
Government Gateway user ID and password: ☐
Bank account details for repayment: ☐

Self-employment / freelance

Total income received: £___ Period: ___
Business expenses (receipts organised): ☐
Mileage log if claiming mileage: ☐
Use of home if claiming: ☐
Invoices issued vs paid: reconciled ☐

Deadlines

Paper return: 31 October
Online return: 31 January
Payment of tax owed: 31 January
Payments on account (if applicable): 31 July

Employment income

P60 from each employer: ☐
P11D (benefits in kind): ☐
P45 if you left a job: ☐
Any PAYE coding notices: ☐

Other income

Rental income details: ☐
Savings interest (bank statements): ☐
Dividend income: ☐
Capital gains: ☐
Gift Aid donations (for tax relief): ☐