

# Personal Tax Return Checklist

## Year ended 5 April 2025

### Employments

- ☐ P60 certificate of pay and tax
- ☐ P45 leaver's certificate of pay and tax
- ☐ P11D benefits and expenses
- ☐ Records of receipts from third parties
- ☐ Receipts for allowable expenses
- ☐ Records to support claims to restrict assessable benefits, e.g. mileage records
- ☐ Copy of notices of coding
- ☐ Details of any student loan repayments

### Self Employed Income

- ☐ Income receivable
- ☐ Expenditure incurred

### Pensions

- ☐ P60/receipts
- ☐ Lump sum receipt details
- ☐ State pension receipts

### Savings Income

- ☐ Interest certificates from bank and building societies
- ☐ Interest statements from National Savings
- ☐ Dividend and interest vouchers from companies and Unit Trusts

### Rental Income

- ☐ Rent receivable
- ☐ Expenses incurred including repairs, decorating, rates, agents fees etc.
- ☐ Interest paid on loans for purchase etc.
- ☐ Capital expenditure on improvements

### Foreign Income

- ☐ Receipts/vouchers from income and details of any foreign tax deducted or paid

### Child Benefit

*If you or your partner received Child Benefit and one of your income is over £60k*

- ☐ The total amount of child benefit received from 6 April 2024 to 5 April 2025
- ☐ The number of children you or your partner received child benefit for during the period 6 April 2024 to 5 April 2025

### Income from Settlements and Estates

- ☐ Certificates of tax deducted (forms R185 etc.)
- ☐ If no R185, details of income and vouchers/receipts etc.

### Capital Gains

- ☐ Description of investment/asset
- ☐ Sale proceeds
- ☐ Date sold
- ☐ Purchase cost
- ☐ Date purchased
- ☐ Any enhancement expenditure

### ☐ Any Other Income

### Allowances and Reliefs

- ☐ Pension contributions
- ☐ Interest paid on a qualifying loan
- ☐ Venture Capital Trust certificates
- ☐ Enterprise Investment Scheme certificates
- ☐ Gift aid payments