

# 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

### 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

### 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