

SUCCEED AT SELF ASSESSMENT TAX RETURN CHECKLIST

This checklist has been created to help you make sure you have all the right documents to complete your tax return. This is going to be most useful if you're self employed and/or have PAYE employment in the 2024/2025 tax year (6 April 2024 to 5 April 2025). If it's more complex we recommend getting more professional help. Click here to get in touch.

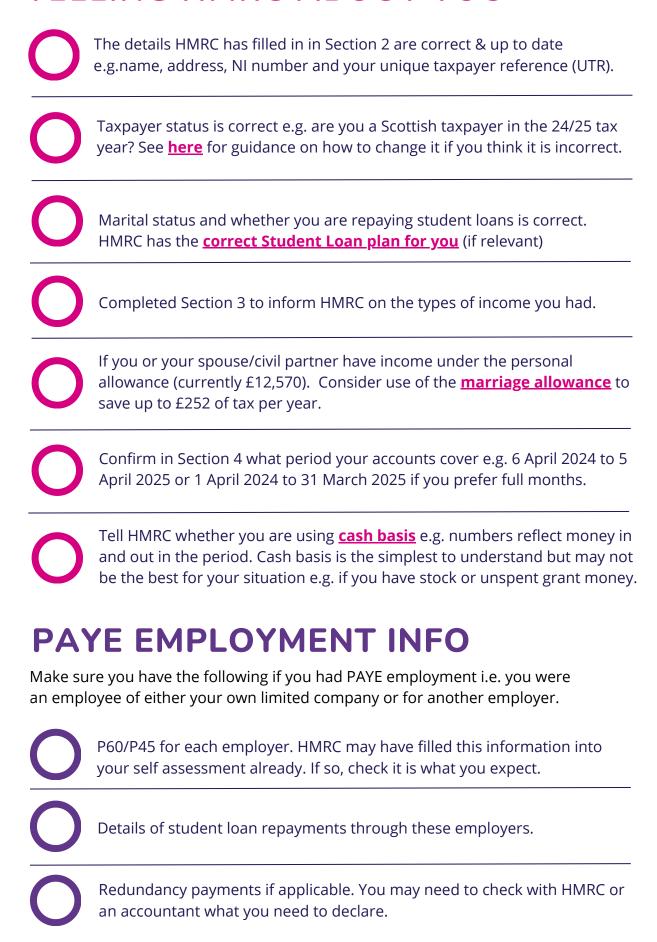
Looking ahead: Making Tax Digital for Income Tax

From April 2026, if your self-employment and/or property income is over £50,000, you'll need to use MTD-compatible software and submit quarterly updates.

Even if you're not affected in 2026, now's a great time to start building good digital habits. Using accounting software like FreeAgent (free with some business bank accounts) or Xero can make your self-assessment much easier - and they're MTD-ready when you need them.

Learn more here

TELLING HMRC ABOUT YOU



SELF EMPLOYMENT INFO

The items assume you're completing your accounts on cash basis and you don't already have a digital bookkeeping system (e.g. Xero, Free Agent etc.) with this included.

Learn more about software that makes your life easier - and ready for MTD

0	Bank and credit card statements for the period. Preferably in CSV form.
O	Invoices paid by clients during the period.
O	Support for cash sales if applicable. Ask yourself how you could prove to HMRC that you are not under reporting cash income.
O	Other sales records e.g. from paypal, stripe or other online systems/platforms.
0	Details of grants received. Project grants tend to be taxable. 'Buying time' grants might not be. Taxable grants might mean cash basis isn't suitable for you. We can guide you on this.
0	Details of loans given to the business including from yourself. You don't include these as taxable income so it good to know what to exclude.
O	Gather your electronic receipts and invoices for business expenditure into one place e.g. a receipts folder, dropbox etc depending on preference.
O	Gather your paper receipts and invoices for business expenditure into one place e.g. a folder or envelope per month. Or convert to digital records.
0	If you work from home then gather evidence of what you spent on mortgage interest/ rent, heat, electricity, council tax and insurance. See here for a helpful visual guide or HMRC's official guidance for full details.
0	Phone and broadband bills whether business only or mixed personal/business.
	Mileage records for business travel e.g. tracker, app or your diary if not tracked.

OTHER USEFUL INFORMATION

O	Last year's self-assessment for reference especially if you have had losses either this year or in the past which you can claim refunds for.
O	Amount of dividends received from shares (e.g. in your own company or others).
O	Details of how much you paid to private pensions (excluding salary sacrifice pensions).
O	Gift Aid: If you pay higher or additional rate tax (e.g. 40%+) you can get some tax back so include the details of any donations under the gift aid scheme.
O	Benefits. Some benefits are taxable and may need to be declared as per this list.
O	For Limited Company Directors - New Digital ID Requirement: From the 18th of November 2025, all company directors and people with

FOR ADDITIONAL SUPPORT OR GUIDANCE TO MAKE IT EASIER NEXT YEAR:

significant control (PSCs) must verify their identity with Companies House.

Get in touch

Learn more here.



