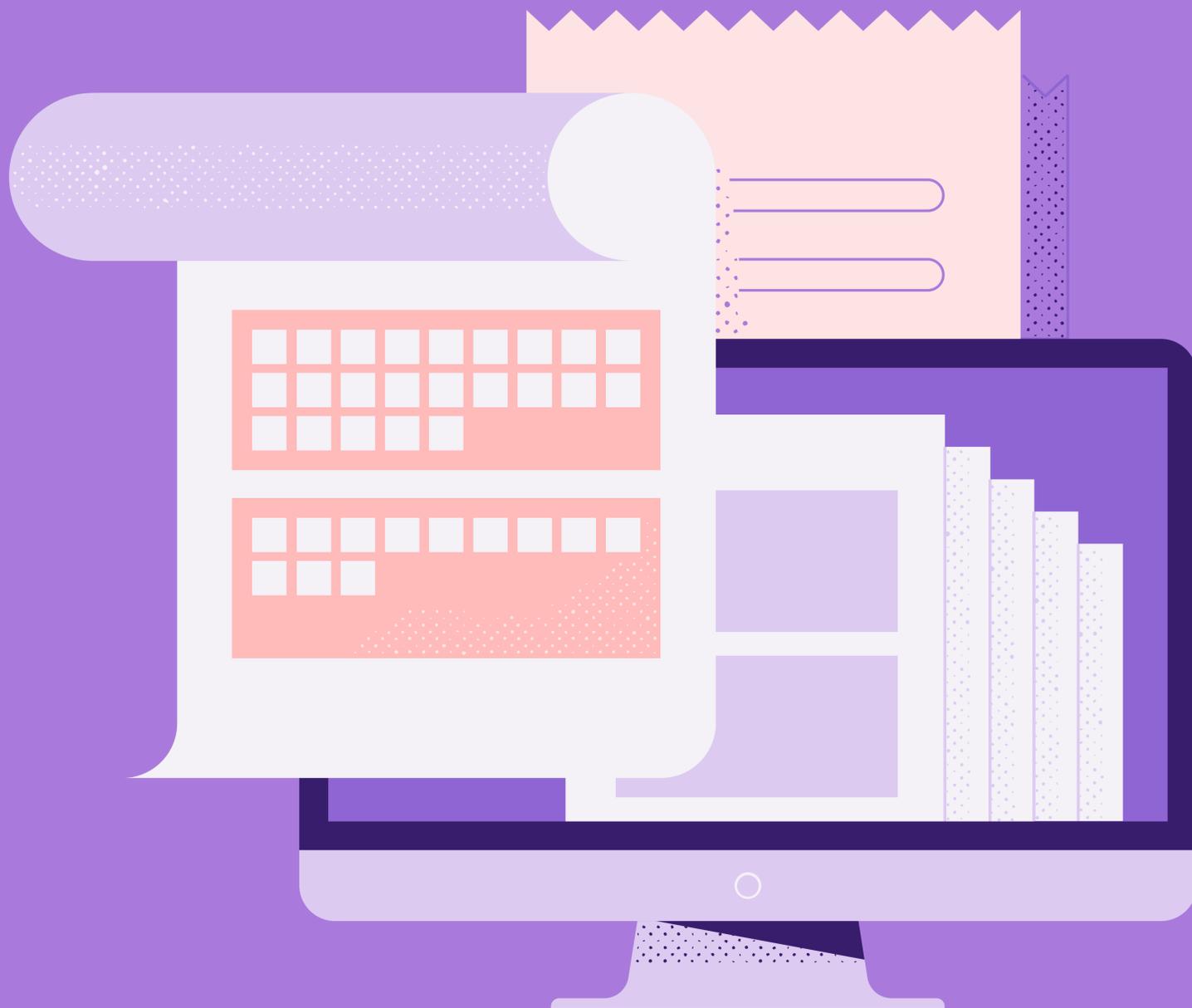


Self Assessment document checklist

The information you need to make sense of Self Assessment.
The documents you should have to hand to file your tax return as quickly and smoothly as possible.



Self Assessment document checklist

Section	The documents you may need	Good to know
Employment	<ul style="list-style-type: none"> • P60 • P45 • P11D • Payment receipts for any professional fees or subscriptions you've paid in the tax year 	Complete a separate section for every employment you've held during the tax year. Most of the information you need should be on from your P60, P11D or P45 documents.
Self-Employment	<ul style="list-style-type: none"> • Receipts for all your allowable and disallowed business expenses, ideally listed on a spreadsheet as per HMRC's categories • Receipts for all asset purchases • Total turnover from all your sole trader businesses • If your business turnover exceeds £85,000, you may also need to provide a balance sheet 	<p>If you have multiple sole trader businesses, aggregate the total income and expenses.</p> <p>If you use the Amaiz App for your client invoicing, the invoices section will help to find your total turnover for the tax year.</p>
Property	<ul style="list-style-type: none"> • Receipts for all your allowable property expenses, ideally listed on a spreadsheet as per HMRC's categories • Receipt totals for repairs and maintenance, and for any incurred professional fees can also be included in this section • Receipts for all asset purchases • Mortgage statements and ground rent/service charge summaries • If you have had to travel due to your rental properties you may be able to claim the mileage on your tax return too 	If you have multiple properties, aggregate the total income and expenses.

<p><u>Interest and dividends from UK banks and building societies</u></p>	<ul style="list-style-type: none"> • Accounts summaries for all your savings accounts showing the interest received • <u>Dividend</u> vouchers from all the companies that you have received dividends from • Dividend vouchers from shares owned in LTD companies 	<p>You shouldn't include interest received in Individual Savings Account (ISAs).</p>
<p><u>Tax Relief and Pensions</u></p>	<ul style="list-style-type: none"> • Statements from pension providers showing the amount of <u>personal pension contributions</u> made to any registered personal pension scheme (personal pension contributions certificates) 	<p>Do not include any pension payments an employer has made into your pension scheme or any pension payments made from your salary.</p>
<p><u>Charitable giving</u></p>	<ul style="list-style-type: none"> • <u>Gift aid</u> statements detailing the donations made to charities during the tax year 	<p>If you are a higher rate tax payer, donations made via the Gift Aid scheme to registered charities may warrant additional tax relief.</p>
<p><u>High Income Child benefit charge</u></p>	<ul style="list-style-type: none"> • Bank statements showing <u>child benefit</u> payments received during the year if yours or your partner's total income exceeded £50,000 	
<p><u>Marriage allowance</u></p>	<ul style="list-style-type: none"> • Keep you and your partner's NI numbers handy if you want to apply for the <u>marriage allowance</u> 	<p>If you expect your total annual income to fall under £11,850, you may be able to transfer some of your personal allowance to your spouse.</p>
<p><u>Tax over-payments</u></p>	<ul style="list-style-type: none"> • Your bank details, if you want any tax repayment to be made to your bank account 	

Remember, you don't need to submit any receipts or paperwork with your tax return unless asked you're asked to do so by HMRC. If you do upload any paperwork with your tax return, it could delay processing, especially if you are due a tax repayment. Always keep the deadline in mind and gather your documents as soon as you can.

Good luck from all of us at Amaiz. If you have any general questions, you can always [ask our team of accountants](#). They're ready to provide straightforward answers to members of our Advanced plan on a range of accounting topics, especially Self Assessment.