

Self-Assessment Tax Return Checklist & Declaration

The following information is required for the accurate completion of your Self-Assessment Tax Return, please review each area carefully and provide all associated paperwork or indicate that you do not have anything to declare. **Period : 6th April to 5th April**

AREA	PAPERWORK ENCLOSED	NOTHING TO DECLARE
Employment :		
- P60(s) from all Employments		
- P45(s) from all Employments		
- P11d Expenses & Benefits Form(s)		
- Professional Fees / Subscriptions to claim		
Pensions :		
- P60(s) from all Pension Providers if in receipt of a Pension		
- Details of Pension Contributions made and Scheme Details		
Self Employment / Partnerships :		
- Accounts relating to Self Employment		
- Accounts relating to Partnerships		
- CIS Payment & Deduction Statements		
Investments :		
- Interest on all accounts (Jointly & Solely held)		
- Dividend Vouchers for payments received		
- Disposals of Assets : Stocks, Shares, Land, Property etc...		
Student Loans :		
- Do you have an outstanding Student Loan		
Property :		
- Income & Expenditure from UK Rental Properties		
- Income & Expenditure from Foreign Rental Properties		
Trusts :		
- Income from trusts, settlement or residue of an estate		
Charitable Giving :		
- Details of Donations made (where Gift Aid has been authorised)		
Child Benefit Income ? : Confirm £ Amount Received		
Other Income :		
Any other form of income not stated above		

SUPPORTING RECEIPTS & ACCOUNT STATEMENTS MUST BE PROVIDED

I confirm that I have provided all relevant information to RMD Accountancy to complete my Self-Assessment Tax Return and I have received no other form of income during the period concerned.

Signed : _____

Print : _____

Date : _____