

Self-assessment tax return checklist (6th April 2020 to 5th April 2021)

ABOUT YOU			
Full name:			
Date of birth:		Unique taxpayer ref:	
Address:			
Telephone:	Home:		Mobile:
Email address:			
Spouse / Civil Partner full name:			
Spouse / Civil Partner date of birth:			
Does your spouse / Civil Partner earn less than the personal allowance of £12,570:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If yes, have you applied for Marriage Allowance online	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Was child benefit paid during the tax year?	To you:		To your partner:
If yes, who has the higher income?	You:		Partner:
If yes:	How many children:		Amount received:

EMPLOYMENT		
Employment income		
<i>Please tick yes or N/A for each item and provide a copy or scan of the relevant paperwork when you submit this form</i>	Yes	N/A
Forms P60 / P45 and tax coding notices	<input type="checkbox"/>	<input type="checkbox"/>
Form P11D (details of expenses and benefits)	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses		
How many weeks did you work from home during the 2020-21 tax year?		

Did your employer reimburse you for any of the time you worked from home? If yes, how much?	<input type="checkbox"/>	<input type="checkbox"/>
Other expenses you believe may be deductible (e.g. business miles travelled in your own car if you were reimbursed less than 45p per mile)	<input type="checkbox"/>	<input type="checkbox"/>
Any other comments/information about employment?		

SELF - EMPLOYMENT

Self-employed income

Please tick yes or N/A for each item and provide a copy or scan of the relevant paperwork when you submit this form

Yes

N/A

Did you receive self-employed income over £1,000 during the year?

Please provide us with your self-employed accounting records

Any other comments/information about self-employment?

PROPERTY

Did you receive rental income over £1,000 in the year?

Do you have rental property / properties?

Please provide the information in each section below for each property:

Address:

Property income

Gross rent received (the total amount before letting agent fees are paid)

Property outgoings

Letting agent fees

Insurance(s)

Finance charges (redemption / re-mortgage fees)

Accountancy costs	
Mortgage / loan interest	
Service charges	
Ground rents	
Council tax / water / utilities	
Redecoration	
Garden upkeep	
Mileage (number of journeys you have made to the let property)	
Legal costs (please provide details)	
Repairs (please provide a full breakdown of costs)	
Maintenance (please provide a full breakdown of costs)	
Any other comments/information about UK property?	

PENSIONS		
Pension income		
Have you received a state pension?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you receive 12 or 13 receipts?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a lump sum payment in the year having previously deferred your state pension?	<input type="checkbox"/>	<input type="checkbox"/>
P60 or certificate of gross and tax from private pension(s)	<input type="checkbox"/>	<input type="checkbox"/>
Pension contributions		
Certificate(s) of pension contribution(s)	<input type="checkbox"/>	<input type="checkbox"/>
Any other comments about pensions?		

SAVINGS & INVESTMENTS

Savings & investment income

Bank and / or building society interest (including accounts closed in the year)	<input type="checkbox"/>	<input type="checkbox"/>
National Savings (provide certificate)	<input type="checkbox"/>	<input type="checkbox"/>
Other interest received	<input type="checkbox"/>	<input type="checkbox"/>
Dividends from shares in UK companies	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your shareholdings change during the year (please provide relevant paperwork)?	<input type="checkbox"/>	<input type="checkbox"/>
Scrip dividends	<input type="checkbox"/>	<input type="checkbox"/>
Income from UK unit trusts	<input type="checkbox"/>	<input type="checkbox"/>
Income from foreign savings & investments	<input type="checkbox"/>	<input type="checkbox"/>
Income from trusts & estates (enclose form R185 / R185E)	<input type="checkbox"/>	<input type="checkbox"/>

Investment outgoings

Share transactions (contract notes & other details)	<input type="checkbox"/>	<input type="checkbox"/>
Share options granted or exercised	<input type="checkbox"/>	<input type="checkbox"/>

Any other comments about investments?

Capital Gains

Did you sell/dispose of any assets (stocks / shares / land / business)?	<input type="checkbox"/>	<input type="checkbox"/>	
Date purchased		Date sold	
Purchase price		Sale price	

Any other comments/information about capital gains?

OTHER		
Other income		
Any other income not already listed either in the UK or abroad?	<input type="checkbox"/>	<input type="checkbox"/>
How many days did you live outside the UK for during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any substantial gifts and / or inheritance during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any maintenance payments during the year (please provide date and amount of Court Order)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any compensation / PPI payments?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, what was the sum of the interest paid to you?	<input type="checkbox"/>	<input type="checkbox"/>
Other outgoings		
Loan interest (excluding student loans)	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a student loan?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you make any repayments during this tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Which loan plan type do you have (type 1 or type 2)?	<input type="checkbox"/>	<input type="checkbox"/>
Will your student loan be repaid within 2 years?	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations (higher rate taxpayers - provide receipt from charity)	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any substantial gifts during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you invest funds in an SEIS, EIS or VCT (please provide details)?	<input type="checkbox"/>	<input type="checkbox"/>
Any other comments?		

Thank you for taking the time to complete this checklist. Please return to taxreturns@numbers-ltd.co.uk