



This is a complete list of any possible sources of income and allowances, and can be used as a guide to anything we may require in order to complete your 2022/23 Self Assessment tax return (06 April 2022 - 05 April 2023) which must be submitted to HM Revenue & Customs by **31 January 2024**. Please review or complete this checklist and provide us with necessary information as soon as possible.

		Please Tick or mark N/A
General		
HMRC paperwork	The latest Self Assessment Tax Statement of Account, if you received one from HMRC	
Personal details	Any change in your marital status	
Contact details	Any change in your home address or contact details	
Student loans	Details of any student loan plans you are liable for (Plan 1, Plan 2, Plan 4 or Post-Graduate)	
Income		
Employment	P60, P45 or P11D documents. Details of any taxable lump sums; fixed deductions from employment or redundancy payments. Are you a director or office holder?	
Self-Employment & Partnership	Accounting paperwork for your Accounting Period that ended in this tax year. Details of income (including any Coronavirus support schemes such as SEISS payments) and expenses arising or business accounts together with a note of any capital/asset additions or disposals in 2022/23.	
CIS Subcontractor	Tax Certificates from construction industry Contractors between 06 April 2022 and 05 April 2023.	
Pensions	State Pension, private pensions and overseas pensions received, during the tax year.	
Benefits	State benefits or allowances received, during the tax year, including Jobseeker's allowance. Child Benefit received by you, your partner or paid to someone else for a child/children living with you, and your partner's income. The date it ceased, if applicable.	
Income from Property	Details of any rental income, mortgage statements for the tax year including interest paid (if interest only). Details of any expenses, repairs/maintenance, service charge, ground rent etc.	
Bank/Building Society Accounts	Interest received on any accounts from statements or certificates of interest received from your bank, including any joint accounts and enter your share of the income.	
UK Dividends	Dividend vouchers and scrip dividend vouchers (where shares received in lieu of whole or part of dividend). Details of all UK shares held.	
Foreign Income	Interest received on any foreign accounts. Dividend vouchers from any foreign holdings, details of all foreign shares held. Amounts should be provided in £GBP. Foreign employment payslips covering the tax year. Details & dates if you were overseas. Any other received or remitted income from overseas.	
Life insurance Policies	Income from insurance policies or deceased person's estates.	
Trusts & Estates	Any discretionary/non-discretionary payments or income chargeable on settlors. Any income from UK / Foreign estates and associated finance costs	
Cryptocurrency/digital assets	Details of any income from cryptocurrency activities such as staking, mining or airdrops. Details of cost/sale proceeds for any cryptocurrency disposals.	
Other Sources	Documentary evidence of any other income or details of source, when it first arose, amount received and if tax already deducted.	
Capital Transactions		
Shares and Securities	Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.	
Share Options	Documentation for options granted or exercised.	
Chargeable Assets	Full details of the cost/sale proceeds for any other assets, whether in the UK or overseas	
Life Assurance Investment Bonds	All relevant Certificates.	
Outgoings		
Professional Subs. & allowances	Subscriptions or memberships paid to relevant professional bodies or trade associations. Any other allowances or deductions relating to your employment/work.	
Pensions	Details of all payments to pensions including any statements/P60s. State pension figure.	
Gift Aid Donations	Details of payments and charity donations made under the Gift Aid scheme.	
EIS/SEIS, VCT etc.	Details of subscriptions to Enterprise Investment Schemes, Seed EIS, Venture Capital Trusts and Social or Community Investment tax relief schemes. Copy of any EIS3/SEIS3/Certificates.	
Other reliefs and deductions		
	Any qualifying maintenance paid to a former spouse or civil partner	
	Post-cessation expenses, pre-incorporation losses, losses on relevant discounted securities.	
	Are you in receipt of a Marriage Allowance Transfer or have you made a Marriage Allowance Transfer to a partner or spouse?	