



Self-Assessment Checklist – Business

Business Info

Name & Address of the Business:

Date you started the business: _____

- What type of business are you?
 - Sole Trader / Limited / Partnership / Other (please give detail)
- Company registration number (if applicable): _____

I need to know about income and expenditure: I do not need actual copies of all documents, but you do need to have them in case you get an audit.

Feel free to upload documents to your portal if you wish, or just a spreadsheet or other list detailing the information is fine.

Income (any of these are fine)

- Your turnover amount (invoices less credits)
- Any other income (grants, loans, investments etc)

Expenses relating solely to the business.

**** expenses must be “wholly and exclusively” for business purposes****

- Bills you have paid
- Directs costs (buying / making your products, shipping etc)
- Overheads (like rent, utility bills, marketing, stationary etc)
- Bank costs / interest
- Insurance
- Legal Fees
- Services
- Charity Donations (to a registered charity)
- Advertising / Marketing
- Training
- Consulting
- Wages & other payroll costs
- Mileage
- Equipment bought (laptop, machinery etc)
- Anything else you can think of