



Self-Assessment Checklist – Personal

I need to know about your personal income and expenditure: I do not need actual copies of applicable documents, but you do need to have them in case you are audited.

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

Income – for example

- Benefits
- Pension Income
- Overseas Income
- Rental Income
- Self-Employment
- Employment (P60 or P45)
- P11d
- Trust income
- Capital Gains
- Cash lump sums received
- Bank Interest received
- Dividends received
- Covid grants

Spending – for example

- Private Pension payments
- Charitable donations (that you have gift aid receipts for or can otherwise prove)
- Student Loan payments
- Anything else you can think of