



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 get an audit.

Feel free to send documents over if you want, 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)
- Trust income
- Capital Gains
- Cash lump sums received
- Bank Interest received
- Dividends received

Spending – for example

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