

2019/2020 (6/4/19 – 5/4/20) SELF ASSESSMENT CHECKLIST

This list is not exhaustive


1. Form P60, which gives details of your gross earnings and tax deducted for the year.
2. Form P11D, which gives details of your benefits in kind arising from your employment.
3. Details of any interest received from bank deposit and/or building society accounts during the year.
4. Details of any self-employed income and expenses during the year.
5. Details of any dividends received during the year.
6. Details of the amounts you have received in respect of your State or Private Pension.
7. Details of any shares bought or sold during the year.
8. Details of rent income and expenses for the year.
9. Details of any child benefit received during the year (also include this if paid to your partner/wife).
10. Details of any outstanding student loans which still require repayment.
11. Details relating to capital gains such as sale of assets, shares, property, or capital distributions.
12. Details of any donations, pension contributions or investments (EIS/SEIS/VCT)
13. Details of Mis-sold PPI payments reclaimed.
14. All the above details for your partner, husband or wife if necessary.
15. Any other items you may consider relevant to your personal tax affairs.


If you have any questions please do not hesitate to contact us!

Yours Sincerely,

Futureproof Accounting Team

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