

Self Employed Paperwork Checklist for Tax Return Completion

Name Mobile No

Email address

It is our policy to ensure tax returns are produced quickly and accurately, whilst safely saving tax for our customers. To make this easier and to avoid delays please read and complete the following tick-list, attaching the relevant information. Without this information, we are unable to produce the return:

FROM 6th April - 5th April of the relevant tax year

- Bank Statements (for the account where the self-employed income has been received) Y N
This is vital to make sure no income or expenses are missed. When completing CIS returns, if the income is not exactly right, it may delay payment of the rebate. A bank statement will show everything needed.
- CIS Statements/Payslips from Contractors (if applicable) Y N
- Invoices raised for work completed (if applicable) Y N
- Any P45/P60 for PAYE (Employed) work (if applicable) Y N
- Paperwork regarding government benefits you have (if applicable) Y N
Note we do not need any information on Child Benefit or Working Tax Credits as this is not applicable.
- Any paperwork regarding private pensions (if applicable) Y N
State Pension Payment information is not required.
- Expenses/receipts you have incurred as a result of completing your work (if applicable) Y N
Unsure what to include? Put in whatever you have and we will work out what can be used. See our website for information on what expenses you can claim.
- Please confirm any dates during the tax year when you were not working/on holiday