Self Assessment documents checklist

Before you file a Self Assessment return, gather your UTR and National Insurance number, your Government Gateway sign-in, any P60, P45 or P11D, your business and rental income and expense records, interest and dividend statements, details of anything you sold that may have made a gain, and records of pension contributions and Gift Aid. The 2025/26 online return is due by 31 January 2027.

References and sign-in

- [ ] Your 10-digit Unique Taxpayer Reference (UTR).
- [ ] Your National Insurance number.
- [ ] Your Government Gateway user ID and password, or your accountant's details if they file for you.

Employment and pensions

- [ ] P60 for each job you held on 5 April.
- [ ] P45 for any job you left during the tax year.
- [ ] P11D if you received taxable benefits such as a company car.
- [ ] Details of any state, workplace or private pension income.

Self-employment

- [ ] Total business income (turnover) for the period.
- [ ] Business expenses, with receipts, invoices and bank statements behind them.
- [ ] Mileage log, if you claim vehicle costs at the flat rate.
- [ ] Purchases of equipment or vehicles, for capital allowances.

Property

- [ ] Rent received for each property.
- [ ] Allowable expenses: repairs, agent fees, insurance, council tax and utilities you paid.
- [ ] Mortgage interest statements, kept separate from other costs.

Savings, investments and gains

- [ ] Interest statements from banks and building societies.
- [ ] Dividend vouchers or statements.
- [ ] Records of anything you sold or gave away that may have made a gain: shares, property, crypto.
- [ ] Any foreign income.

Reliefs and charges

- [ ] Personal pension contributions you paid yourself.
- [ ] Gift Aid donations.
- [ ] Child Benefit received, if your or your partner's income is high enough for the High Income Child Benefit Charge.
- [ ] Student loan plan type, if repayments aren't already taken through payroll.

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Guidance and the latest version: https://www.countify.co.uk/resources/checklists/self-assessment-documents-checklist