

## 2025/26 Tax Checklist:-

- **Interest** credited to any bank/building society accounts held during the year. The banks/finance companies provide HMRC with interest figures for all individuals. Therefore it is important that your interest declared on your self assessment tax return aligns with the information held by HMRC.
- **Dividends** on shares – you should have received certificates/tax vouchers. Similarly, any unit trust or other investment income.
- **Investment Portfolio** – Please send us a copy of the report and consolidated certificate.
- **Employment Income**
  - P60/P45
  - Benefits in Kind details e.g. form P11d or if your Benefits are payrolled please let us know
  - Tax Code Notices
  - Did you pay for any expenses related to your employment e.g. professional subscriptions, business mileage not reimbursed by your employer.
  - Are you required by your employer to wear a uniform?
- If you have a **student loan** and are liable to make repayments, please provide full details including the Plan Number.
- **State Benefits** received i.e. state pension, jobseekers allowance, carers allowance, employment and support allowance etc. If you are currently deferring your state pension please let us know.
- **Income Tax Charge on Winter Fuel Payments** please let us know if you received the Winter Fuel Payment during the winter of 2025 (2025/26).
- **Private Pension** income received together with form P60/P45.
- **Self Employment/Partnership** income and expenses details.
- **Rental** Income and Expenses, **together with mortgage interest** if relevant and property ownership details. Common costs are: Insurance, gas certificate, repairs, management fees, travel to property, buy to let mortgages interest details, other mortgages on your own home in relation to a rental property, mortgage advice fees, light and heat, council tax.
- **Personal Pension Contributions**, please provide annual pension summary from pension provider.
- **Gift Aid** e.g. gifts to registered charities.
- **Child Benefit** received by anyone in the household and for how many children. If you have stopped your child benefit in the tax year, please advise your last payment date.
- **Marriage Allowance** – if your spouse has unused personal allowance you may be eligible to claim. Please let us know if your marriage status has changed or if you have already claimed this allowance.
- **Capital Transactions** - disposals of shares, property, investments or other assets.
- Any **other earnings** or income received e.g. foreign income, chargeable event gains, trust income.

- Any **other reliefs** - EIS/SEIS, qualifying interest etc.
- Were there any changes to your marital status, living circumstances or births of children?