

# Here's your handy TLC tax return checklist!

2020-21



We get it, putting together the paperwork for self assessment is boring and it's easy to forget something. We can't help with the boring bit, but we can make life easier by suggesting you follow this checklist. Everything you supply needs to relate to dates between 6th April 2020 to 5th April 2021.

If we look after your company we will have on file already your company P60/P11d/dividends.

## EARNED INCOME

### Employment/Pensions

March 2021 payslip	
Forms P60/P45	
Form P11D (please advise of any benefits not included on P11D)	
Pension form P60/P45	
State pension	

### Sole Trader

Accounting books / records	
Self-employed sick pay/unemployment benefit	

## INVESTMENT AND OTHER INCOME

### Interest received from

Banks / Building societies (If you have multiple accounts please list below)	
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### Dividends

UK companies / Foreign companies / Unit trusts	
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### Land and property (rental income)

Rents / Ground rents / Holiday lettings	
Lodgers / Rent a room	
Use of home spreadsheet	

## CAPITAL TRANSACTIONS

### Disposal / acquisition of assets

Property and land	
Stocks and shares	
SEIS/EIS/VCT investments	

## COVID CONSIDERATIONS

Working from home	
Incorrectly claimed Self-Employed Income Support Scheme	
Income from SEISS grants	

## OUTGOINGS & EXPENSES

### Interest paid on loans

To acquire company shares or loan to your business	
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### Charitable donations, etc under the formal schemes e.g. Gift Aid

Amounts paid	
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### Pension scheme contributions

Amount paid by you into your pension	
Amount paid in by an employer/company	

### Expenses incurred re. land & property (rental income)

Mortgage interest / Insurance / Repairs	
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### Expenses in employment

Professional subscriptions	
Mileage at less than 45p per mile	

### Expenses as sole trader

Stock / Use of home / Employee / Tel. / Mileage etc	
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### Student loan

Student loan repayment etc	
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### Child benefit

Amounts received if you earn over £50,000 pa	
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### Marriage allowance

If your spouse has income of less than £12,500 please let us know	
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## ADDITIONAL INFORMATION

Please add any additional information, change or circumstance details or general comments here, or attach additional sheets...

### NEED A HAND?

Give us a call with any problems on **01937 534505** and don't forget our address is **Parkhill Studio, Walton Road, Wetherby, LS22 5DZ**

[www.tlccountants.com](http://www.tlccountants.com)

Tax Advisers  
& Accountants