

# Here's your handy TLC tax return checklist!

2022-23



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 2022 to 5th April 2023.

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

EARNED INCOME	
<b>Employment/Pensions</b>	
March 2023 payslip	
Forms P60/P45	
Form P11D (please advise of any benefits not included on P11D)	
Pension form P60/P45	
State pension	
<b>Sole Trader</b>	
Accounting books / records	
Self-employed sick pay/unemployment benefit	

INVESTMENT AND OTHER INCOME	
<b>Interest received from</b>	
Banks / Building societies (If you have multiple accounts please list below)	
<b>Dividends</b>	
UK companies / Foreign companies / Unit trusts	
<b>Land and property (rental income)</b>	
Rents / Ground rents / Holiday lettings	
Lodgers / Rent a room	
Use of home spreadsheet	

CAPITAL TRANSACTIONS	
<b>Disposal / acquisition of assets</b>	
Property and land	
Stocks and shares	
SEIS/EIS/VCT investments	

OUTGOINGS & EXPENSES	
<b>Interest paid on loans</b>	
To acquire company shares or loan to your business	
<b>Charitable donations, etc under the formal schemes e.g. Gift Aid</b>	
Amounts paid	
<b>Pension scheme contributions</b>	
Amount paid by you into your pension	
Amount paid in by an employer/company	
<b>Expenses incurred re. land &amp; property (rental income)</b>	
Mortgage interest / Insurance / Repairs	
<b>Expenses in employment</b>	
Professional subscriptions	
Mileage at less than 45p per mile	
Working from home	
<b>Expenses as sole trader</b>	
Stock / Use of home / Employee / Tel. / Mileage etc	
<b>Student loan</b>	
Student loan repayment etc	
<b>Child benefit</b>	
Amounts received if you earn over £50,000 pa	
<b>Marriage allowance</b>	
If your spouse has income of less than £12,570 please let us know	

## 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.tlcaccountants.com](http://www.tlcaccountants.com)

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## ADDITIONAL INFORMATION

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