

Here's your handy TLC tax return checklist!

2023-24



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 2023 to 5th April 2024.

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

EARNED INCOME	
Employment/Pensions	
March 2024 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)	
Dividends	
UK companies / Foreign companies / Unit trusts	
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	

OUTGOINGS & EXPENSES	
Interest paid on loans	
To acquire company shares or loan to your business	
Charitable donations, etc under the formal schemes e.g. Gift Aid	
Amounts paid	
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	
Expenses in employment	
Professional subscriptions	
Mileage at less than 45p per mile	
Working from home	
Expenses as sole trader	
Stock / Use of home / Employee / Tel. / Mileage etc	
Student loan	
Student loan repayment etc	
Child benefit	
Amounts received if you earn over £50,000 pa	
Marriage allowance	
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.tlccountants.com

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ADDITIONAL INFORMATION

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