**Self Assessment Documents to consider:**

**Employment/Pension Income**

* **P60** - If you are in continuing employment or receiving a pension, your employer/pension scheme will be issuing your P60 that details your salary and any tax deducted for the year. *This should be issued by the end of May.*
* **P45** – If you have left an employer during the year, they should have provided you with a P45 that details your salary and any tax deducted during your employment with them.
* **P11D** – This details the value of any benefits received from your employer. *This should be issued by 6 July.* If you have changed employers during the tax year, now is the time to get in touch with your previous employer to get a copy of your P11d.
* **March 2023 payslip** – this is useful for us to highlight pensions or salary sacrifice in place with your employer.
* **Redundancy** –if you have been made redundant during the tax year, please provide us with all correspondence from your employer regarding payments due to us to ensure that the correct tax has been deducted.
* **Mileage** – Where mileage is reimbursed by your employer below the 45p HMRC allowance, you need to log all of your mileage claimed so that the difference between your employer’s rate and the HMRC mileage allowance rate can be reclaimed. *Please also state if you were using your own car or a company car.*
* **PAYE coding notice** – you will be receiving your 2023/24 PAYE coding notice from HMRC. It is your responsibility to check this and ensure that it is correct to ensure the correct amount of PAYE is deducted by your employer.
* **Pension statement** – an annual statement from your pension provider detailing any contributions made and the value of the portfolio.

**Interest income**

* Most banks/building societies/investment funds will start to issue annual statements of interest and income which will contain a summary of the details that are required to be disclosed on the tax return.
* Please confirm if accounts are solely or jointly held.

*There is a £1,000 allowance for basic rate taxpayers and £500 for higher rate. However, we would still like details of interest received for our files, even if you have received less than this.*

**Investment income**

* Obtain consolidated tax certificates (CTC) from your IFA or investment fund which will contain a summary of the details that are required to be disclosed on the tax return.
* If you are a company shareholder, provide dates and amounts taken as dividends from the company in list form.

**Mortgage payments on rental properties**

* Mortgage providers issue annual mortgage statements around this time with details of allowable interest deductions on rental properties. Please request this from your mortgage provider so that we can include the correct interest deduction in your rental property accounts.

***Additional information for sole traders and partnerships***

If you are a sole trader or in a partnership, we will require the following information: -

* Bank statements (business and personal), PayPal statements, and credit card statements relating to the period should all be collated to verify income and expenses. (It is preferable to receive statements in csv. format please.)
* Fixed asset purchases or disposals during the year
* Copy of VAT returns (where applicable)
* List of debtors and creditors at year end and details of what is still outstanding (i.e., amounts that people owed you and you owed others)
* Stock or work in progress summary as at the year-end date
* Where any working from home has occurred, please supply details of utilities, insurance and mortgage interest payments for the year (***see checklist attached to this email***)