

Self Assessment Checklist 2026/27

Gather these documents before filing your tax return. Tick each item as you collect it. From PayToolkit.co.uk

Personal Details

- Unique Taxpayer Reference (UTR) number — 10 digits
- National Insurance number
- Government Gateway login details
- Your address and contact details

Employment Income

- P60 form from employer(s) for year to 5 April 2027
- P45 form if you left a job during the tax year
- P11D form if you received benefits in kind (company car, health insurance)
- Payslips (if P60 not available)
- Details of any taxable expenses reimbursed by employer

Self-Employment Income

- Total business turnover / income for the tax year
- All business expense receipts (materials, tools, travel)
- Mileage log with business miles and dates
- Bank statements for business account
- Invoices issued to clients
- Accountancy or bookkeeping fees

Property Income (Rentals, Airbnb, FHL)

- Total rental income received
- Mortgage interest statements (for finance cost relief)
- Insurance, repairs, maintenance receipts
- Agent fees and management costs
- Council tax and utility bills (if paid by landlord)
- Furnishings and equipment purchases

Investments, Savings & Dividends

- Bank and building society interest statements
- Dividend vouchers from UK companies
- Unit trust / OEIC dividend statements
- ISAs — no tax due but declare if over subscription limit
- Cryptoasset disposal records (capital gains)

Self Assessment Checklist 2026/27 — Page 2

Pensions

- State Pension amount received
- Private pension income statements (P60 from pension provider)
- Pension contribution records (personal and employer)
- Lifetime allowance check (if large contributions)

Capital Gains

- Property sale details (completion statement, purchase price)
- Share or investment disposal records
- Cryptoasset sale/trade records
- Business asset sale documents
- Costs of disposal (solicitor fees, estate agent fees)

Foreign Income

- Overseas employment income
- Foreign property rental income
- Foreign investment income and dividends
- Foreign tax paid (for double taxation relief)
- Exchange rates used for conversion

Tax Reliefs & Allowances

- Marriage Allowance (if transferring to spouse)
- Gift Aid donations (charitable giving)
- Pension tax relief claims (higher rate)
- SEIS/EIS/VCT investment tax relief
- Blind Person's Allowance
- Professional subscriptions

Student Loans

- Student loan balance at start of tax year
- Student loan Plan type (1, 2, 4 or 5)
- Postgraduate loan details (if applicable)
- Student loan statements showing repayments

Child Benefit High Income Charge

- Child Benefit amounts received
- Income over £60,000 (charge applies between £60k-£80k)
- Option to opt out of Child Benefit to avoid charge

Key Deadlines

Deadline	Date	Penalty if Missed
Register for SA	5 Oct 2027	Cannot file return
Paper filing	31 Oct 2027	£100 + escalating

Online filing	31 Jan 2028	£100 + escalating
Payment due	31 Jan 2028	Interest + 5% surcharge

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