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## ■ Self-Assessment Tax Return Checklist

### Step 1: Do I Need to File?

- ☐ Self-employed sole trader (earned more than £1,000 before expenses)
- ☐ Partner in a business partnership
- ☐ Landlord (rental income)
- ☐ Received untaxed income (dividends, savings, investments)
- ☐ Earned income from abroad taxable in the UK
- ☐ Income over £100,000
- ☐ Claimed Child Benefit and income over £50,000
- ☐ Sold assets and may owe Capital Gains Tax

### Step 2: Register

- ☐ Registered with HMRC for Self-Assessment (by 5 October if first time)

### Step 3: Gather Your Records

- ☐ Income details (invoices, payslips, bank statements)
- ☐ Business expenses/receipts
- ☐ Pension contributions and gift aid donations
- ☐ Rental income & expenses (if landlord)
- ☐ Investment income (dividends, interest, capital gains)
- ☐ Foreign income details

### Step 4: Deadlines

- ☐ Paper return submitted by 31 October
- ☐ Online return submitted by 31 January
- ☐ Tax bill paid by 31 January
- ☐ Second payment on account made by 31 July (if applicable)



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## Step 5: Avoid Penalties

- ☐ Filed on time
- ☐ Paid on time
- ☐ Kept records safe (minimum 5 years after 31 January deadline)

## Step 6: Get Support

- ☐ Spoke with accountant/adviser
- ☐ Checked for allowances/reliefs I can claim
- ☐ Confirmed payments are budgeted for

Tip: Even if you think your return is simple, professional advice can save you money and stress. Get in touch with Richardson Swift on 01225 325580 or email on [hello@richardsonswift.co.uk](mailto:hello@richardsonswift.co.uk), if you need help.



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