



2026 Tax Return Checklist

Your tax return must reflect all sources of income from 6 April 2025 to 5 April 2026.

If you are Self-employed or in a partnership

Access to your bookkeeping software if used (such as QuickBooks)

Bank statements for all bank accounts used for business (including any credit cards).

Please send bank statements in .CSV (excel) format and PDF where possible.

Sales invoices / evidence of income / CIS statements

Receipts for purchases and expenses

Spreadsheets, accounts books, or access to digital bookkeeping software

Cheque book & paying in book, if still used.

List of debtors at the year-end (people who owe you money)

List of creditors at the year-end (people you owe money to)

Value of stock (at cost price) at the year-end

Any work in progress that has not yet been invoiced.

Details of any loans, including recent statement showing interest.

Details of any new business vehicles or machinery, including finance agreements

If you are employed or have PAYE income

2026 P60 for each and every employment in the tax year

Any P45's dated between 6th April 2026 to 5th April 2026

2026 P11d if applicable. You might not receive this until mid-July 2026

If you have rental properties (including any properties currently empty)

Rent received for each month during the year or agent statements (if you use one)

Receipts for expenses (repairs, maintenance, ground rent, safety certificates, insurance etc)

Mortgage statements showing interest paid.

If you receive a pension

2026 P60 from every private pension

Full details of any lump sums that have been withdrawn, inc tax-free amount (possibly P45)

State pension letter (dated April 2025) advising how much you will receive each week.

If you pay into a pension

Details of any private pension contributions made in the year.

If you have Interest, Savings, Investment and Building Society Accounts

Annual interest summaries from all bank accounts, savings accounts and investments.

If you have Shares, Dividend vouchers & Cryptocurrency

Dividend vouchers – UK and Worldwide

Consolidated Tax Vouchers

Details of any share or crypto sales

If you have a Student Loan

Details of any Student Loans you have, including 'Plan' details.

Any payments made during the year.

If you have any worldwide income

Any income and / or savings in overseas or foreign currency accounts.

If you have a Chargeable Gains from UK life insurance policies

Chargeable Gain Certificate(s)

If you receive Child Benefit

If anyone in your household is in receipt of Child Benefit and anyone in the household has income above £60,000 please let us know

If you claim Married Couples Allowance

Please let us know if you have applied for Married Couples Allowance, so we can reflect this in our tax calculations. Please note this is only beneficial if you or your spouse earns below the tax-free personal allowance.

If you have donated using Gift Aid

Please let us know if you have made any donations under gift aid.

If you have moved house?

Please let us know your new address, and include a copy of a recent bank statement, your updated driving licence or a copy of your gas / electric bill. We will let HMRC know.

Do you have any other information?

This list is not exhaustive but shows the most common kinds of records and types of income we deal with. ALL your income needs to be declared on your tax return regardless of whether it is taxed at source or not. If you are unsure about something, please include it or contact us to check.



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