



PERSONAL TAX RETURN CHECKLIST

Tax Year: 6 April 2025 – 5 April 2026

WH Internal Deadline: 31 Oct 2026

HMRC Submission Deadline: 31 Jan 2027

The following checklist has been prepared to assist you with providing the information required for your personal tax return for the year ending **5 April 2026**.



If you have any questions please contact us.



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PERSONAL TAX RETURN CHECKLIST

Your tax return must include all sources of income and gains, irrespective of whether they originate within the United Kingdom or abroad. It is important that this return is submitted to HM Revenue & Customs **by 31 January 2027**.

To assist you in compiling the necessary information, we have provided the following sections as a detailed guide. Please review each section carefully and provide all relevant information accordingly. Please note that this checklist should not be regarded as an exhaustive list as there may be other items required depending on your specific circumstances.

Once you have assembled all the necessary documentation, please send it to us by 31 October 2026 ahead of HMRC's 31 January 2027 deadline.



OVERVIEW



PERSONAL DETAILS

Current address, email address, contact telephone number



INCOME

Employment, self-employment, pensions, rental & property, investment, foreign



OUTGOINGS

Pension contributions, interest paid on loans to acquire shares in a private company or an interest in a partnership, investment in Enterprise Zones, charitable donations



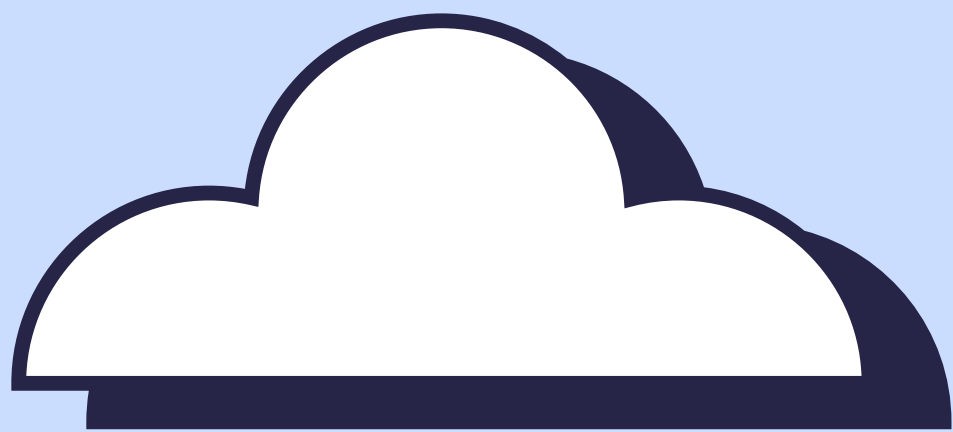
CAPITAL GAINS & LOSSES

Land & property, stocks & shares, royalties, patents, paintings, antiques



OTHER TAX RETURN ENTRIES

Pensions Tax Charge, child benefit high income tax charge, student loan payments



PERSONAL DETAILS

**Please make sure that we have the correct
and up to date details for the following:**



Current address (and the date you changed
address if you have moved in the last year)

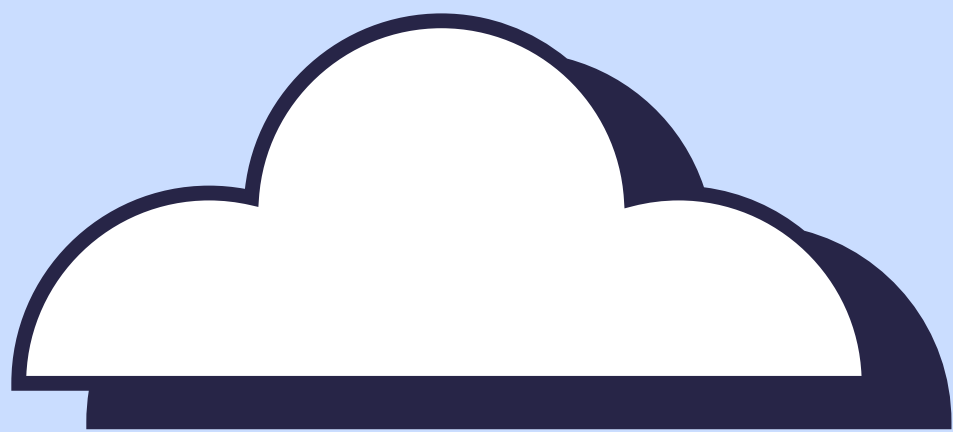


Preferred contact telephone number



Email address





INCOME

**Income, benefits and expenses
from employment:**



Pay and tax as shown on the 2025/2026 form P60 or P45 issued by your employer



Benefits in kind as shown on the 2025/2026 form P11D issued by your employer



Expenses necessarily incurred in your employment such as mileage allowances that are not reimbursed by your employer

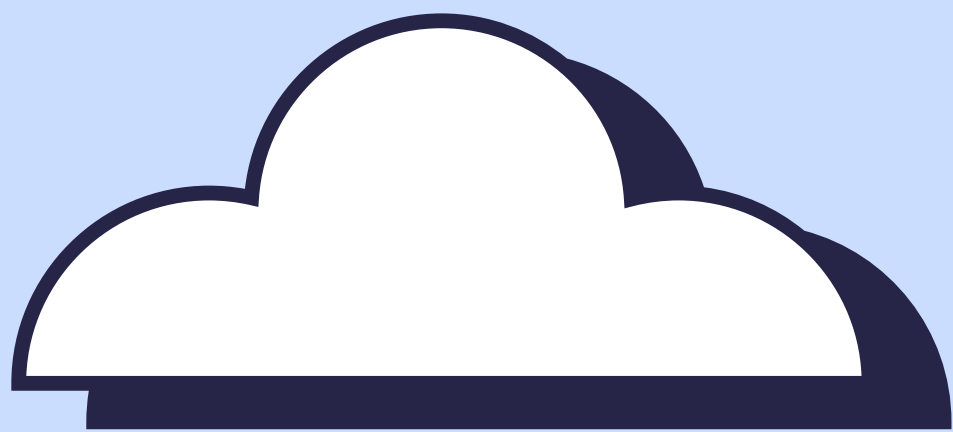


Shares or options received from employee share schemes



Professional fees and subscriptions paid





INCOME

Other benefits and pensions including:



State pensions and other taxable state benefits



The 2025/2026 form P60 or annual statement for any other pensions or annuities

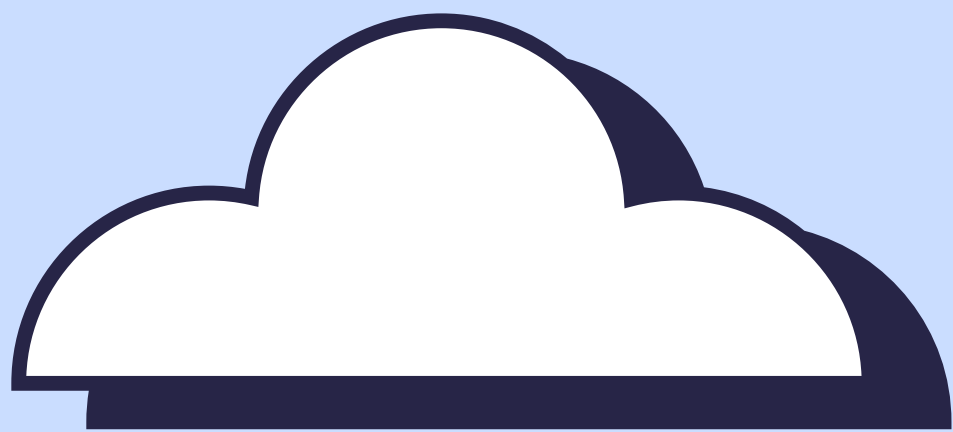


Lump sums from unapproved retirement benefits schemes



Benefits received where you have owned or contributed to the acquisition of any assets which are treated as excluded from your estate (the pre-owned assets tax charge)





INCOME

Income and expenses relating to self-employment or partnership businesses:



Details of all income and expenses relating to the business supported by the books and records, bank statements, invoices and receipts

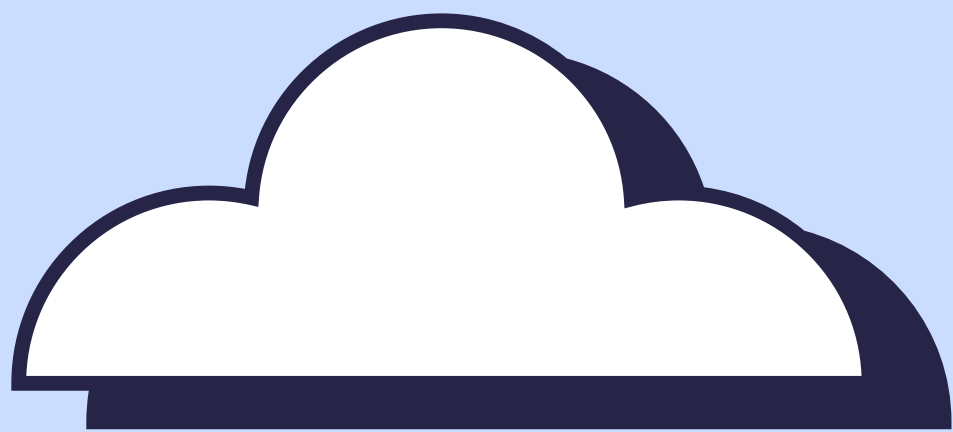
Income from trusts or the estates of deceased persons:



Please supply details of any payments you have received from a trust whether that trust was created by you or by someone else. If you received a certificate R185 from the Trustees, please send us this



Please also supply details of any inheritance or distribution that you have received from the estate of a deceased person



INCOME

Income and expenses relating to the rental of land or property:



All income and expenses relating to each rental property supported by the books and records, bank statements, invoices, receipts and if relevant monthly statements from your letting agent



Interest paid in the year ended 5 April 2026 on loans used to purchase the property. Please do not include the capital element of any repayments made



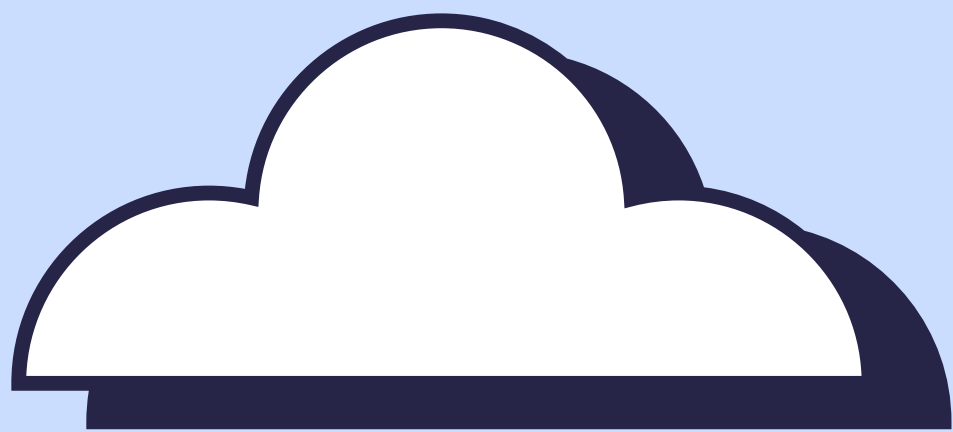
State whether each property is let furnished or unfurnished



Indicate where the property is let as furnished holiday accommodation and, if so, if the criteria for this have been met



Provide the full address for each property



INCOME

Investment Income



Interest credited to bank, building society, or any other cash deposit accounts. Please note, whilst this may have minimal in previous years due to poor rates, and therefore not provided to us, given the recent interest rate hikes it is likely this will now have an impact on your tax position so we require all these details in full.



Dividends and Interest distributions from unit trusts and open-ended investment companies

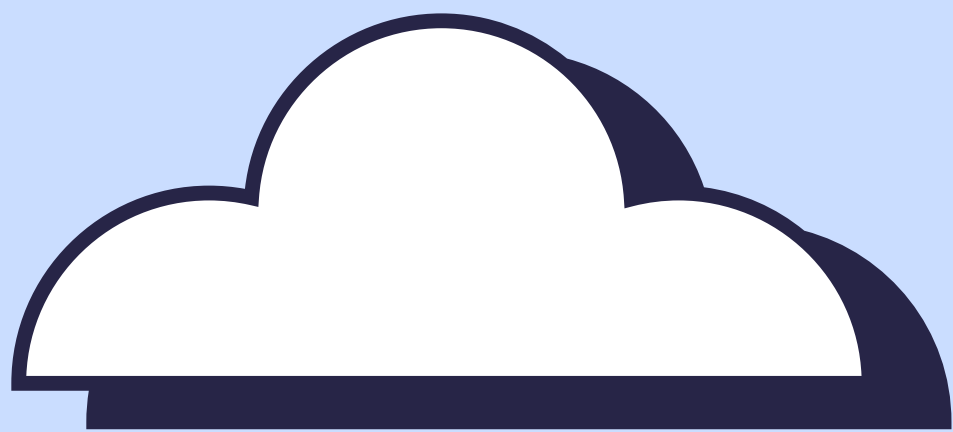


Interest on National Savings & Investments



Dividends and interest from companies (both quoted and unquoted companies)





INCOME

Investment Income Continued



Interest on Government stocks



Interest on fixed interest bonds etc.



Gains on life insurance policies, life annuities and capital redemption policies



Any other investment
(income including loans
written off)





INCOME

Foreign Income

Please supply details of any income arising overseas whether or not this is brought into the UK. We need to have details of everything you receive but some typical sources of overseas income would include...



Employment income



Pension income



Self-employment income – including one-off fees



Rental from land and property



Bank deposit interest

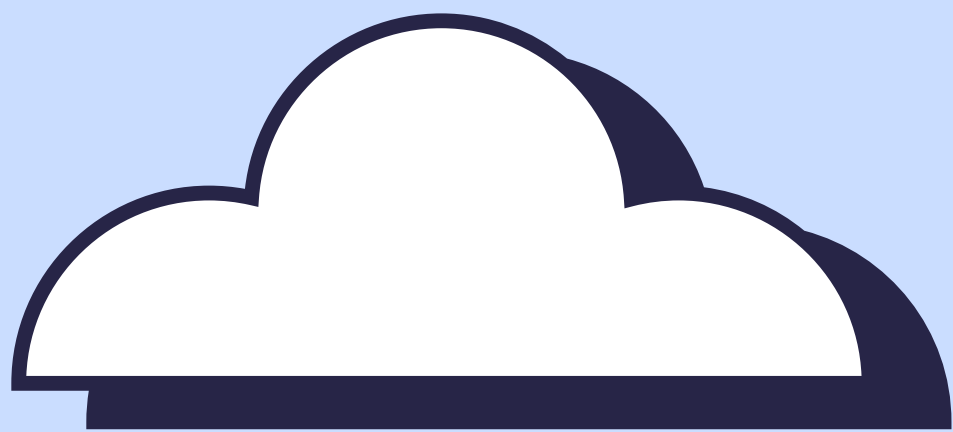


Dividends



Income from Trusts

If you have spent time outside of the UK (other than for holidays etc.) then please let us know as this may affect your residency status and we may need to request further information from you.



OUTGOINGS

Allowances & reliefs which you might like to claim:



Contributions to pension plans, superannuation schemes and retirement annuity plans



Interest paid on loans to acquire shares in a private company or an interest in a partnership



Marriage allowance transfer if your spouse or civil partner is a non-taxpayer. Please supply their full name, date of birth, national insurance number and date of marriage



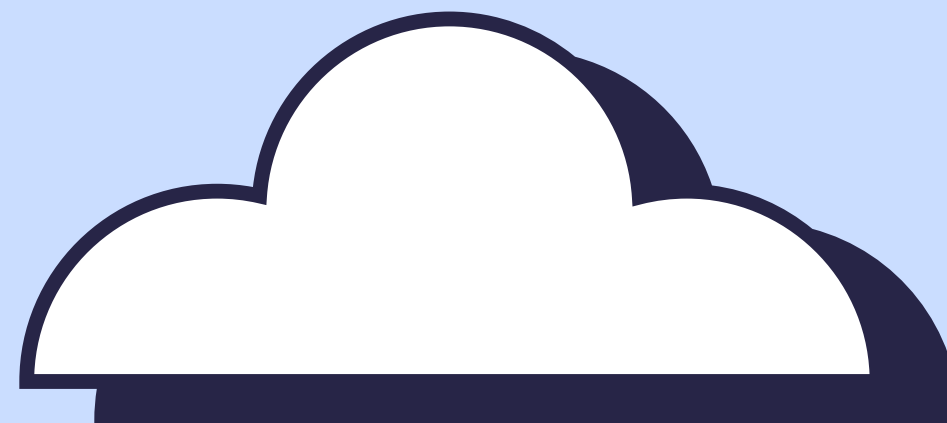
Investments in Venture Capital Trust (VCT) or (Seed) Enterprise Investment Schemes



Investments in Enterprise Zones



Charitable donations made under Gift Aid or deed of covenant



CAPITAL GAINS & LOSSES

You need to tell us if you have disposed of any assets during the year ended 5 April 2026 whether or not you received any payment in exchange and even where the asset was held and the disposal occurred outside of the UK. This applies to all disposals by sale, gift or transfer and includes gifts to relatives. You need to tell us about all assets disposed of but some typical ones would be...



Land and property – including your home



Stocks and shares – including shares in private companies



Self-employment income – including one-off fees



Paintings, other works of art and antiques



Foreign currency (except small amounts for personal use on holiday)



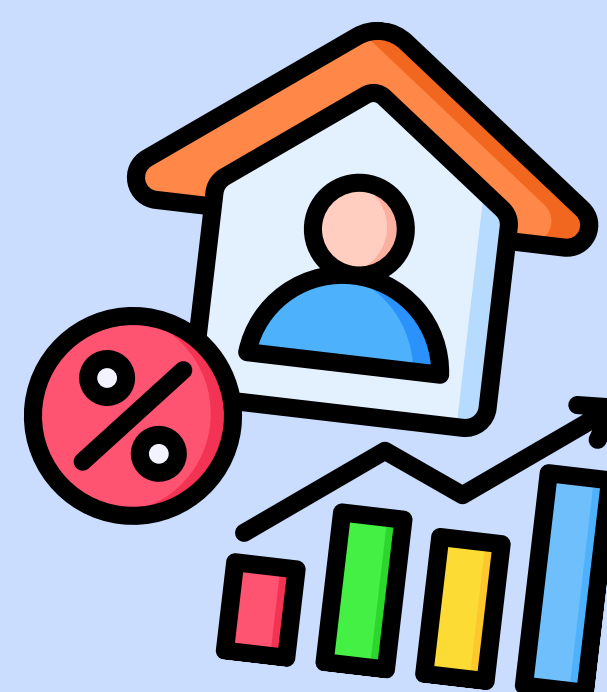
Commodities or futures transactions



Interest in a business or partnership



Royalties, patents, licenses and other rights





OTHER TAX RETURN ENTRIES

Pension Tax Charge

If you or your employer contributed to a pension scheme for you during the year and those contributions exceeded the annual allowance of £60,000 (or lower if your income is high) there may be a tax charge. If you believe you might be liable to such a charge, please supply copies of any correspondence, statements or calculations provided by your pension scheme administrator.





OTHER TAX RETURN ENTRIES

Child Benefit High Income Tax Charge

If you or your partner (Spouse/Civil Partner/Living together) claims Child Benefit and if either of you has an income before personal allowances of £60,000 or more, please supply the following:



The amount of Child Benefit you and your partner were entitled to receive between 6 April 2025 and 5 April 2026



If your partner has income in excess of £60,000, files their own return and intends to pay the tax charge themselves via their own tax return, please let us know





OTHER TAX RETURN ENTRIES

Student Loan Payments

If you are liable to make student loan repayments, please supply the following:



Details of any repayments made during the year by deduction from salary



The plan type and when you graduated



If you have paid off the loan during the year and have received a notice to this effect from the student loan company, please let us have a copy

