

# Self Assessment Tax Return: Checklist

Closing the 2024/25 tax year

The Self Assessment process can feel overwhelming, particularly if your income or circumstances have changed during the year.

That is why we have put together a checklist highlighting the key information HMRC expects to see. By working through it ahead of time, you can reduce the risk of mistakes, avoid last-minute pressure and make the submission process straightforward.

Action	Details	Status
Review income documentation for 2024/25	<p>This could include:</p> <ul style="list-style-type: none"> <li>• Employment income</li> <li>• Business profits</li> <li>• Rental income</li> <li>• Any taxable government grants or support payments.</li> </ul>	
Gather necessary documentation	<p>This includes but is not limited to:</p> <ul style="list-style-type: none"> <li>• Income records</li> <li>• Dividend vouchers</li> <li>• Rental income statements</li> <li>• Bank interest certificates</li> <li>• Receipts for business expenses</li> </ul>	
Check all information is correct	<ul style="list-style-type: none"> <li>• Does your income align with payments made?</li> <li>• Are any personal expenses labelled as a business expense?</li> <li>• Is there any information missing?</li> </ul>	
Complete your Self Assessment	<p>You can file your Self Assessment <a href="#">here</a>.</p> <p>Note: You will need a Unique Taxpayer Reference (UTR). This is a 10-digit number often referred to as a 'tax reference'. Find yours <a href="#">here</a>.</p>	
Pay any tax owed	<p>Once your Self Assessment is complete, you can check whether you owe any additional tax by reviewing your HMRC online account, or the SA302 tax calculation generated after your return is filed.</p>	

## Here when you need us

If you have any questions about filing your Self Assessment tax return, please get in touch with our team.

Visit our website

Email us