ERRINGTON LANGER PINNER
CHARTERED ACCOUNTANTS

Self Assessment document checklist

Everything we need to prepare your tax return

Checklist, 2026/27

Tick off what applies to you and send it to us. The earlier we have your papers, the more time there is to find every relief, and to tell you what to pay before 31 January.

Income

- [ ] P60 from each employer, and P45 if you left a job
- [ ] P11D showing benefits in kind, such as a company car or medical insurance
- [ ] Self-employed income and expenses for the year
- [ ] Rental income and costs for each property
- [ ] Bank and building society interest statements
- [ ] Dividend vouchers or statements from shares and investments
- [ ] Pension income: state pension and any P60 from a private pension
- [ ] Any other income, such as from abroad or from a trust

Payments that can reduce your tax

- [ ] Personal pension contributions
- [ ] Gift Aid donations to charity
- [ ] Investments in EIS, SEIS or VCT schemes, with the certificates
- [ ] Student loan or postgraduate loan details

Sales and gifts of assets

- [ ] Property sold (other than your main home): purchase and sale details and costs
- [ ] Shares or crypto-assets sold: dates, amounts and costs
- [ ] Any gifts of assets to people other than a spouse or civil partner

Key dates

Date	What happens
5 October	Register for Self Assessment if this is your first year
31 October	Paper return deadline
30 December	File online by today to have tax under £3,000 collected through your tax code
31 January	Online return and balancing payment, plus first payment on account
31 July	Second payment on account

Errington Langer Pinner, Chartered Accountants
Pyramid House, 954 High Road, London N12 9RT
020 8446 6911 · info@elp-ca.co.uk · www.elp-ca.co.uk

General information for the 2026/27 tax year, not advice for your circumstances. Please talk to us before acting. Registered to carry on audit work in the UK and regulated for a range of investment business activities by the Institute of Chartered Accountants in England and Wales.

Scan to find us online

Website · YouTube · LinkedIn · Instagram · WhatsApp