


The Ultimate Self Assessment Checklist + 5 Tax-Saving Tips

Solving Legal Matters

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Self Assessment Checklist

Before you start, gather everything HMRC will expect. Missing documents cause delays or errors.

You'll need:

- ▶ Payslips, P60s and P45s
- ▶ Invoices and records of self-employed income
- ▶ Rental income statements and letting agent summaries
- ▶ Bank interest and dividend vouchers
- ▶ Pension contributions & Gift Aid records
- ▶ Records of benefits in kind (company car, health insurance, etc.)



Allowable Expenses

Claiming expenses reduces your taxable profit.
Here are the most common ones



Business travel
and mileage (not
commuting)



Home office
costs (portion of
rent, bills,
internet)



Software,
apps, and
subscriptions



Professional
fees,
memberships,
and training



Marketing,
advertising,
and website
costs

Deadlines Timeline

Missing deadlines = fines.

Mark these dates in your calendar:



5 October

Register for Self
Assessment

31 October

Paper return
deadline

31 January

Online return
& tax payment
deadline

31 July

2nd Payment on
Account deadline
(if applicable)

Common Mistakes to Avoid



Forgetting to declare all income (dividends, crypto, rental, side hustles)



Claiming personal expenses that aren't business-related



Leaving filing until the last minute



Entering incorrect figures or estimates



Not keeping records for at least 5 years



5 Tax-Saving Tips

- ✓ Claim every allowable business expense – it all adds up.
- ✓ Make pension contributions to reduce taxable income.
- ✓ Use tax-efficient investments (ISAs, SEIS, EIS).
- ✓ Offset capital losses against any capital gains.
- ✓ File early – spread the cost and avoid last-minute stress.



Self Assessment Made Easy

Need Help With Your Self Assessment?

The Sigma Company makes tax simple. Our expert accountants take the stress out of your Self Assessment – ensuring it's accurate, efficient, and filed on time.

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