Self-assessment tax return questionnaire 2025/26

Please answer for the tax year 6 April 2025 to 5 April 2026. Sections 1, 2, 5 and 6 are for everyone; complete sections 3 and 4 only if they apply to you. In any section you complete, write “None” rather than leaving a box blank, and list each document you enclose.

1. Your details

Full name	Date of birth
National Insurance number	Unique Taxpayer Reference (UTR)
Home address and postcode	Phone and email
Changes since last year (address, bank, marital status)	Bank account for any tax refund (sort code / account)

2. Income in the tax year

Income type	Yes / No	Amount, or “see attached”	Documents enclosed
Employment (P60, P45, P11D)			
Self-employment / sole trade (complete section 3)			
Partnership share			
UK property rental (complete section 4)			
Bank and building society interest			
Dividends from shares			
State pension and other pensions			
Foreign income or gains			
Capital gains (shares, property, crypto sold)			
Other income (tips, royalties, benefits)			

Anything else your accountant should know (optional)

For example: started or stopped a business, moved abroad, received an HMRC letter, sold a property

3. Self-employment summary (only if you were self-employed)

Business name and what you do	Accounting period end date
Turnover (total sales) for the period	Total allowable expenses
Equipment or vehicles bought (cost and date)	Business miles driven

4. Property income (only if you received rent)

Property address(es)	Your ownership share (%)
Rent received	Letting agent and management fees
Mortgage interest and finance costs	Repairs, insurance and other expenses

5. Payments and reliefs

Item	Yes / No	Amount or details
Personal pension contributions (state net or gross)		
Gift Aid donations		
Student or postgraduate loan (plan type)		
Payments on account already made to HMRC		
Child Benefit received by you or your partner		

Before you send

Before you send this, please check that every box in the sections that apply to you is answered (write “None” where nothing applies), your UTR and National Insurance number are included, your P60, P45 or P11D is enclosed if you were employed, rental and business figures include expenses, and the declaration is signed and dated.

6. Declaration

I confirm the information I have given is complete and correct to the best of my knowledge, and I will tell my accountant about anything I have left out.

Signature	Date

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