

Self-Assessment Tax Checklist for UK Self-Employed (2025-26)

Important Deadlines

- 5 October 2025 - Register for Self Assessment if new to self-employment
- 31 October 2025 - Deadline for paper returns
- 31 January 2026 - Online filing and payment deadline

Documentation to Prepare

- Income records: invoices, sales logs, and bank statements
- Expense receipts: travel, home office, subscriptions, utilities
- Pension statements, loan interest, business-related purchases

Self-Assessment Checklist

- Register for Self Assessment with HMRC by 5 October 2025 (if newly self-employed)
- Keep records of all income (invoices, bank deposits, etc.)
- Track and store receipts for all allowable business expenses
- Keep track of business mileage and travel expenses
- Record any pension contributions made
- Calculate net profit for the 2025-26 tax year (6 April 2025 - 5 April 2026)
- File your tax return online by 31 January 2026
- Pay any tax due by 31 January 2026
- Set aside funds for Payments on Account (if required)
- Review and retain a copy of your submitted return

Need Help?

Contact My Tax Accountant for expert Self Assessment assistance:

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