

Think differently about accounting



Time to complete your 2025/26 tax return

Let's get ahead of your tax return this year

If you've ever found yourself rushing your tax return in January, you'll know how limiting that can be. Starting early reduces stress, improves accuracy, can help lower your tax bill, and gives you time to plan and budget.

What we need from you and why it matters

To complete your 2025/26 tax return accurately and to help keep your bill down, we need your key income and expense information please by Friday 31 July 2026.

This then provides us with sufficient time to review everything carefully and come back to you with any queries if anything needs clarifying. The diagram on the next page illustrates what we need from you and when, to meet your filing and payment on account deadlines.



← Summer holidays →

Christmas ← →

2026

6 April

Start of the new tax year 2026/27.

31 July

Deadline to submit information to Wellers for 2025/26 tax year.
Second payment on account for 2025/26.

31 October

Deadline paper returns.
Deadline to code out your tax.

December

Penultimate month to tax return deadline.

← Summer holidays →

Christmas ← →

2027

31 January

Tax return deadline for 2025/26.
Balancing payment due for 2025/26 & first payment on account for 2026/27.

6 April

Start of new tax year 2027/28.

31 July

Second payment on account due for 2026/27.

Your checklist

On the next page you'll find an extensive checklist. This is for you to use as a guide to gather your documents, please include only what's relevant to you. If you're unsure, do send it anyway and we'll confirm. We'll also include anything we already hold on file.

A note on timing

We always work to optimise your tax position whenever you send in your information. The later it arrives though the less flexibility we have to plan ahead, explore options, and put effective strategies in place. In short, earlier is always better.



Full name:.....

Employment income	Notes
<input type="checkbox"/> Copies of P60 forms for all employments.	
<input type="checkbox"/> A copy of your month 12 (March 2026) payslip.	
<input type="checkbox"/> Copies of any P45 forms you have received during the year in respect of employments that have ceased.	
<input type="checkbox"/> The final payslip for any employment that may have ceased part way through the year.	
<input type="checkbox"/> Copies of P11d (benefit and expenses) forms for all employments.	
<input type="checkbox"/> The amount and date of any redundancy or termination payments you have received during the year. Please provide details of any such payments, or agreements reached with your previous employer.	
<input type="checkbox"/> Allowable expenses relating to your employment including uniforms, work clothing, tools, business mileage, fuel, electricity, travel, professional fees, subscriptions to professional bodies, and costs for working at home, where these costs aren't met by your employer and they are necessary for your duties.	
<input type="checkbox"/> Details of any additional voluntary contributions you, or your employer, have made to your pension scheme.	
<input type="checkbox"/> Details of any employee share scheme options granted, exercised, or sold in the tax year. Please include details of the scheme and whether it is an approved, or unapproved, share scheme.	

**Self employment/Partnership income**

Notes

A copy of your self-employed and/or partnership accounts for this tax year (*please ignore this if we produce your accounts*).

Pension income

Notes

Details of any pensions received, including lump sums and state pension, and where appropriate copies of P60 forms.

For defined benefit schemes, please provide your pension annual growth statement.

Investment income

Notes

Bank and/or Building Society interest received, together with details of any accounts opened/closed during the year, indicating whether the accounts in question are held in your name, or jointly. For joint accounts, please give details of your holding.
Information relating to ISA accounts is not required as they are tax exempt.

Bank term deposit interest received.

Details of any bonuses or windfalls received from any Bank, Building Society or Insurance Company, including details of any shares or cash received where applicable.

Dividends received from UK companies and unit trusts together with all relevant dividend vouchers.

If your investments are managed by a 3rd party, please provide us with your annual investment income consolidated tax certificate.

Details of any taxable income from share options or share related benefits in the year.

Details and chargeable event certificates for any gains on UK life insurance policies, life annuities, capital redemption policies, and chargeable events relating to investment bonds.



Land and property income		Notes
<input type="checkbox"/>	Details of gross rents received and expenditure incurred (if you have let more than one property, please provide the information on a property-by-property basis).	
<input type="checkbox"/>	A summary of the mortgage interest paid during the tax year in relation to each property.	
<input type="checkbox"/>	Details of any rent a room arrangements in your main residence.	
Trusts and estates		Notes
<input type="checkbox"/>	Details of any income from any trust, settlement or estate of a deceased person and copies of R185 forms.	
Foreign income		Notes
<input type="checkbox"/>	Details and underlying paperwork of all foreign income received, and tax deducted.	
<input type="checkbox"/>	Details of any foreign chargeable events.	
<input type="checkbox"/>	Details of any changes to your domicile or residence status, plus where relevant details of any remittances made.	
Pre-owned assets		Notes
<input type="checkbox"/>	Please supply us with details of any assets you have gifted but still retain a benefit or interest in.	



Capital gains

Notes

Capital disposals, or acquisitions, and any changes made to your investments including any matching re-acquisitions made within 30 days after 5 April 2026. This should include details of any foreign capital transactions.

Details of any gains, or losses, from the sale of UK residential property regardless of whether you reported this in the Residential Capital Gains Returns. These transactions need to be declared in your tax return as well.

Tax reliefs

Notes

Gift Aid Donations and other gifts to charities.

Retirement annuity premiums or personal pension premiums paid, together with forms PPCC for single premiums or new policies. Personal pension contributions made, i.e. not processed through a payroll.

We no longer receive copies of PAYE coding notices. If you have received any notices of PAYE coding in connection with employment for years 2024/25 or 2025/26 please send them.

Interest certificates for qualifying business loans and mortgages.

Details of any Enterprise Investment Scheme, Seed Enterprise Investment Scheme or Venture Capital Trust investments you have made.

Please confirm if you have elected to transfer an element of your tax free personal allowance to/from your spouse and if so how much.



Other	Notes
<input type="checkbox"/> Taxable income/benefits received from the Benefits Agency.	
<input type="checkbox"/> The amount you or your partner have received in Child Benefit payments during the year and the number of children for which benefit is received. Please also indicate if this needs disclosing on your tax return based upon your respective income levels.	
<input type="checkbox"/> If you have an outstanding student loan, please provide us with details of what student loan plan you are on, as well as your most recent Student Loan Company Statement or confirm how much you repaid during the year and how much is currently outstanding.	
<input type="checkbox"/> Details of any gains or losses made in respect of cryptocurrencies (eg. Bitcoin).	
<input type="checkbox"/> Details and amounts of any Winter Fuel Payments.	
<input type="checkbox"/> Apart from the above specific information, please provide details of any other sources of income, claims to allowances, or matters which you consider relevant.	

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