

TAX RETURN CHECKLIST

1. Employment income and benefits in kind received (Forms P60 or P45, P11d, Tax Code Notices, details of any payments/benefits not shown on these forms).

Details of any expenditure incurred in employment which has not been reimbursed by your employer i.e. subscriptions, work related travel (home to work travel is excluded).

2. Self-Employment income and expenditure (please supply all of your accounting records).
3. Income and expenditure from any Partnership that you are a partner in.
4. Income from share options or share schemes.
5. Income and expenses from rental of land or property (including loan interest certificates). Identify if the income is from furnished holiday letting or rent from a room in your own home.
6. Income from foreign sources, i.e. offshore accounts, dividends from foreign companies.
7. Income from a Trust, settlement or residue of a deceased person's estate.
8. Proceeds from the disposal of shares or other assets (property or investment etc.) Also provide details of shares, new investments, properties acquired during the year.
9. Income from bank or building society interest received.
10. Any other interest received.
11. Income from dividends and Unit Trusts received.



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12. Income from State pensions, other pension or retirement annuities and other State benefits (Jobseekers Allowance, Incapacity Benefit etc.) Also let us have details of lump sums taken from your pension pot.
13. Income from insurance companies or life insurance policies. Include policies that have been cashed in, matured or partially surrendered.
14. Personal and retirement annuity pension contributions paid.
15. Gift Aid payments made to charities or professional subscriptions paid.
16. Interest paid on any 'qualifying' loans (this includes monies loaned to your business).
17. Any other reliefs or allowances which you think you may claim for.
18. Details of any outstanding student loans.
19. Any other income received.
20. Details of any tax planning arrangements not dealt with through us.
21. Details of gifts of money and/or other assets. Having made the gift, if you have retained some form of benefit from it please provide details.
22. If relevant, the amount of child benefit received by you and your partner. Include the number of children it relates to. If you were entitled to the child benefit but elected not to receive it, please let us know.