

Tax Return Checklist

Please review the list below and provide relevant documents relating to the tax year to Apr-5th in a timely fashion so we can meet the Jan-31st deadline and avoid an immediate penalty of £100.

Employment income	<ul style="list-style-type: none"> Forms P60, P11D, P45, PAYE coding notices Professional subscriptions Expenses of employment paid personally Redundancy payments
Self-employment income <i>(Please ignore this section if we prepare your accounts and you have already sent the relevant information)</i>	<ul style="list-style-type: none"> Accounts drawn up to the year-end Tax deducted at source via the Construction Industry Scheme
Capital gains	<ul style="list-style-type: none"> Evidence of asset acquisition and disposal values (e.g. property, land, shares etc.) Evidence of asset improvement and transaction costs 'Windfall' receipts from building societies/ insurance companies Sales of shares acquired under Company share options
Income from land & property <i>(Including the let of part of your main home)</i>	<ul style="list-style-type: none"> Income from let property and related expenses (ideally detailed on an Excel spreadsheet) Mortgage statements (showing interest portion) Is the property jointly held? Please distinguish purchases of new furnishings from replacement items
Investment income <i>(Excluding ISAs)</i>	<ul style="list-style-type: none"> Interest statements (Is the account jointly held?) Dividends vouchers Chargeable event certificates from investment bonds
Overseas employment and pensions <i>(UK residents are taxed on their worldwide income)</i>	<ul style="list-style-type: none"> Payslips Bank statements (showing earnings deposited) Employer's statement of earnings Employer's statement of foreign tax paid
Overseas investments <i>(UK residents are taxed on their worldwide income)</i>	<ul style="list-style-type: none"> Income from savings, property, shares and other investments abroad
Child benefits	<ul style="list-style-type: none"> Child benefits received (Required if you or your partner have gross income of more than £50,000) Are you the higher earner?
Pension income	<ul style="list-style-type: none"> State pension (weekly rate) Private pension (P60) Pension lump sums/drawdowns Winter fuel allowance
Jobseekers' allowance and other state benefits	
Commissions, fees, tips, royalties etc.	
Company share options granted or exercised	
Income from trusts, settlements and estates	<ul style="list-style-type: none"> R185 certificate
Income received by your minor children from funds provided by you <i>(Excluding ISAs)</i>	
Interest on compensation payments received	<ul style="list-style-type: none"> e.g. PPI claims
Student loan	<ul style="list-style-type: none"> If you have a student loan are you on plan 1 or 2? <i>Plan 1: Loans taken out Sep-1988 – Sep-2012</i> <i>Plan 2: Loans taken out post Sep-2012</i>
Pension contributions	<ul style="list-style-type: none"> Personal contributions made to a pension scheme
Donations to charities	<ul style="list-style-type: none"> Donations made under the Gift Aid scheme
Marriage allowance	<ul style="list-style-type: none"> £1,250 of the personal allowance can be transferred between married couples

Tax refund due?

(If you believe you are due a tax refund, please give details of the bank you would like HMRC to pay the refund to)

- Name of bank
- Sort code
- Account number
- Name of account holder
- Building society reference

If available, please send your PAYE coding notice for the corresponding tax year and prior tax year.