

Tax Data's Personal Self Assessment Tax Return Information Checklist For the year from 6 April 2018 to 5 April 2019.

Please complete this form so that we can prepare your personal tax return ahead of the 31st January 2020 filing deadline.
We shall rely entirely upon the information you provide us to prepare your personal tax return.
So it is important you double check you have entered all the information correctly and accurately.
The list of information we ask for is not exhaustive. If you have any doubts over any of the points raised please call us on 01737 551904.
Please make sure you inform us of any overseas bank accounts or assets you may operate or own respectively.

A. CONFIRMATION OF YOUR PERSONAL DETAILS

Only complete this section for new or changed information.

Your first name(s)	<input type="text"/>		
Your last name	<input type="text"/>		
Your UTR (10 digits)	<input type="text"/>		
Your N.I. number	<input type="text"/>		
Your residential address	<input type="text"/>		
Your postcode	<input type="text"/>		
Spouse's name	<input type="text"/>	Spouse's Date of Birth	<input type="text"/>

Confirmation of your Payments On Account (POA) made to the HMRC relevant to the tax year under review

Please state how much you paid the HMRC in respect of the POA due in January 2019	<input type="text"/>
Please state how much you paid the HMRC in respect of the POA due in July 2019	<input type="text"/>

If no payments were made, enter £0.00

Were there any changes in your personal circumstances during the year?

B. EMPLOYMENT HISTORY

Were you employed during the tax year under review?

If yes, please confirm the number of P60's you are attaching to this firm

Alternatively, for each employment, please give the following details

1 Employer's name	<input type="text"/>
Employer's Payroll Reference	<input type="text"/>
Gross pay received in tax year	<input type="text"/>
Income Tax deducted in tax year	<input type="text"/>
2 Employer's name	<input type="text"/>
Employer's Payroll Reference	<input type="text"/>
Gross pay received in tax year	<input type="text"/>
Income Tax deducted in tax year	<input type="text"/>

Did you receive any Benefits in Kind or expense payments from your employer(s)?

If 'YES' please attach a copy of the P11D statement your employer should have given you. The deadline for employers to supply forms p11d is 31 July 2019.

Were there any fixed or student loan deductions?

Do you incur any expenses which may be claimable (business mileage in your car)

Did any major changes occur in the year (e.g. redundancy, lump sum receipts or retirement)?

If 'YES', please give brief details .

C. OTHER EARNED INCOME

Were you engaged in any self employed or partnership activities during the tax year for profit or loss?

If "Yes" can you supply your accounting paperwork for the accounting period ended in this tax year. These records will detail your income and expenses together with a note of any capital additions or disposals. If you are a subcontractor please provide

all the "Tax Statements" supplied by the contractors you were engaged by. Can you say what you were doing during any periods not covered by the statements?

D. INCOME FROM PROPERTIES

Did you receive any income from any properties you own here or abroad? Y / N

If 'YES' please provide details of the rental income and expenses for each property. This will usually be the agents rental statements and details for any rental expenses you paid personally. Can you also supply a note of the mortgage interest paid and say if the property loan was increased in the year.

E. INCOME FROM PENSIONS

Did you receive any income from a pension fund during the year? Y / N

If 'YES' please provide the P60 you should have received from the pension provider.

Did you receive state pension during the year? Y / N

If 'YES', please record the State Pension you received during the year £
 Please also state the amount your spouse received as state pension £
There may be an opportunity to set-off unsued personal allowances if you are of retirement age

F. OTHER STATE BENEFITS RECEIVED

Did you receive any state benefits such as carer's or job seekers allowances during the year? Y / N

If 'YES' please provide details of the payments received

There is a potential claw-back of Child benefit which may affect you if you have children and you or your (ex) spouse claim Child benefit and your income was over £50,000.

If you think you maybe affected by this enter 'YES' and supply details. Y / N

G. INVESTMENT INCOME RECEIVED

Did you receive any savings account interest during the year? Y / N

If 'YES' please provide details of the investment interest received during the year, even if the payments only amount to a few pence.

Use the boxes below or if there are numerous sources include a schedule with headings for - Source (name of bank/building Society), Account No, Interest received (your share), Tax deducted (most interest is now being paid gross) and the number of account holders where the investment is in joint names.

1 Bank or Building Society name	<input type="text"/>
Account number	<input type="text"/>
Interest received	<input type="text"/>
Was the account in joint names? If so, how many?	<input type="text"/>
2 Bank or Building Society name	<input type="text"/>
Account number	<input type="text"/>
Interest received	<input type="text"/>
Was the account in joint names? If so, how many?	<input type="text"/>
3 Bank or Building Society name	<input type="text"/>
Account number	<input type="text"/>
Interest received	<input type="text"/>
Was the account in joint names? If so, how many?	<input type="text"/>
4 Bank or Building Society name	<input type="text"/>
Account number	<input type="text"/>
Interest received	<input type="text"/>
Was the account in joint names? If so, how many?	<input type="text"/>
5 Bank or Building Society name	<input type="text"/>
Account number	<input type="text"/>
Interest received	<input type="text"/>
Was the account in joint names? If so, how many?	<input type="text"/>

Remember to Include any interest received from PPI repayments.

H. INCOME FROM STOCKS AND SHARES

Did you receive any income from the stocks or shares you held during the year? Y / N

*If 'YES' please provide details of the investment income your received during the year. Where you use a broker they will supply a summary of all the information required for your tax return. They usually call this summary a "Tax Certificate".
If you do not use a broker please supply the dividend vouchers and scrip dividend vouchers (where shares are received in lieu of whole or part of a dividend).*

I. FOREIGN INCOME

Did you receive any income from overseas during the year? Y / N

*If 'YES' please provide details of Interest received on any foreign accounts. Dividend vouchers from any foreign holdings
For foreign employment please supply payslips covering the tax year along with details and the dates you were overseas
Detail any other received or remitted income from overseas.*

J. OTHER INCOME

Did you receive any other income during the year? Y / N

*If 'YES' please provide documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.
Consider income from insurance policies or deceased persons estates.*

K. RELIEFS AND ALLOWABLE DEDUCTIONS AGAINST TAXABLE INCOME

Did you have any loans you believe may qualify for tax relief? Y / N

If 'YES' please provide details of the loan and the interest paid during the year

Did you personally pay into any pension fund (other than through your employment) during the year? Y / N

If 'YES' please provide details of the Pension fund and the gross or net payments made during the year

Did you make any Gift Aid payments or any covenants during the year? Y / N

If 'YES' please provide details of the net payments made during the year.

Do you in pay any allowable profession subscriptions? Y / N

*If 'YES' please provide details. You can check if the Revenue will allow the subscription here.
<http://www.hmrc.gov.uk/list3/list3.htm>*

Did you make any subscriptions to the Enterprise Investment Scheme or SEED EIS or Venture Capital Trust. Y / N

If 'YES' please provide supporting documentation (form EIS3).

Do you make qualifying maintenance payments to a former spouse or civil partner. Y / N

If 'YES' please details.

Did you incur any post-cessation expenses, pre-incorporation losses, losses on relevant discounted securities. Y / N

If 'YES' please details.

If you are married or in a civil partnership can we look at transferring some Peronal Allowance to or from you? Y / N

If 'YES' please details.

L. CAPITAL GAINS

Did you buy, sell or give away any assets subject to Capital Gains Tax regulations? Y / N

If 'YES' please provide details of the purchase or disposals made during the year. Consider prooerty , shares, options granted or exercised, overseas assets, Life assurance bonds etc.