

Please complete and return this list along with the relevant information

		Please Tick or mark N/A
General		
	The latest HMRC Self Assessment Tax Statement of Account, if you received one	
	Any change in your marital status	
	Details of any student loans you are liable to repay, including whether they are Type 1 or Type 2	
Income		
Employment	Form P60 or P45, copy of P11D. Details of any taxable lump sums; fixed deductions from employment and redundancy payments and any student loan deductions deducted.	
	Are you a director or office holder	
Self-Employment & Partnership	Accounting paperwork for your Accounting Period that ended in this tax year. Details of income and expenses arising or business accounts together with a note of any capital additions or disposals.	
CIS Subcontractor	All Tax Statements from Contractors between 6th April and 5th April in addition to Self Employment records	
Pensions	State Pension, private pensions and overseas pensions received, during the tax year.	
Benefits	State benefits or allowances received, during the tax year. Jobseekers allowance.	
	Child Benefit received by you or your partner (including any paid to someone else for a child, that lives with you), the number of children this was applicable to and your partners income and the date it ceased if applicable.	
Income from Property	Details of any rental income, rental statements, rental expenses and mortgage statements for the tax year including interest paid.	
Bank/Building Society Accounts	Interest received on any accounts from statements or certificates of interest received from your bank. Please indicate any Joint Accounts and enter Your Share of the income. (Include any interest received from PPI repayments)	
UK Dividends	Dividend vouchers and scrip dividend vouchers (where shares received in lieu of whole or part of dividend). Details of all UK shares held.	
Foreign Income	Interest received on any foreign accounts. Dividend vouchers from any foreign holdings, details of all foreign shares held. Amounts in sterling	
	Foreign employment payslips covering the tax year. Details & dates overseas	
	Any other received or remitted income from overseas.	
Life insurance Policies	Income from insurance policies or deceased persons estates.	
Other Sources	Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.	
Capital Transactions		
Shares and Securities	Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.	
Share Options	Documentation for options granted or exercised.	
Chargeable Assets	Full details of the cost/sale proceeds for any other assets. Whether in the UK or overseas	
Life Assurance Investment Bonds	All relevant Certificates.	

Client:	UTR:	Ref:	Page 2
Income Tax Return Checklist for year 6 th April 2018 to 5th April 2019 (2018/19)			
Outgoings			
Professional Subs & allowances	Subscriptions paid to professional bodies or trade associations. Any other allowances or deductions		
Pensions	Details of all payments to pensions including any statements.		
Gift Aid Donations	Details of payments made under the gift aid scheme.		
EIS/SEIS & VCT	Details of subscriptions to the Enterprise Investment Scheme or SEED EIS or Venture Capital Trust. Copy of any forms EIS3 received.		
Inheritance Tax	Details of all gifts made over £250 including name of recipient		
Other reliefs and deductions			
	Qualifying maintenance paid to a former spouse or civil partner		
	Post-cessation expenses, pre-incorporation losses, losses on relevant discounted securities.		
	Are you in receipt of a Marriage Allowance Transfer?		
	Have you made a Marriage Allowance Transfer to a partner or spouse?		

Instructions

Please check and update any changes to your personal details. Please provide details of income for the tax year to 5th April 2019.

Please provide documentation for all income that you have declared below, such as P60, dividend vouchers, bank interest certificates and any additional relevant information. If you have any other sources of income please provide full documentation regardless of whether tax has been deducted. Please provide details of any allowances you are electing to claim for the year to 5th April 2019. Finally, if you are liable to make student loan repayments, please provide details, including whether the repayments are liable under Plan A or Plan B.

Personal Details

Name:

Address:

Telephone:

Mobile:

Email address:

Date of Birth:

UTR - Tax Reference:

Marital Status:

National Insurance Number:

Income

Employment

	Salary	Tax
New Employment		

Additional Information

If you have any further income, losses, capital gains or tax reliefs during the tax year to 2019, please provide full details below.