

Tax Return Checklist

Employment income	<ul style="list-style-type: none"> • Forms P60, P11D, P45, PAYE coding notices • Work from home allowance • Professional subscriptions • Mileage (non-commuting) • Employment related uniforms or tools 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? <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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? • Total received in the year and for how many children?
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? • Plan 1: Loans taken out Sep-1988 – Sep-2012 • Plan 2: Loans taken out post Sep-2012
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"> • £1,260 of the personal allowance can be transferred between married couples
Tax refund due? <i>(If you believe you are due a tax refund, please give details of the bank you would like HMRC to pay the refund to)</i>	<ul style="list-style-type: none"> • 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.