

## Tax Return Checklist

# THINK TAX RETURN

SORTING OUT YOUR TAXES SO YOU DON'T HAVE TO.

Employment income	<ul style="list-style-type: none"> <li>• Forms P60, P11D, P45, PAYE coding notices</li> <li>• Work from home allowance</li> <li>• Professional subscriptions</li> <li>• Mileage (non-commuting)</li> <li>• Employment related uniforms or tools paid personally</li> <li>• Redundancy payments</li> </ul>
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"> <li><input type="checkbox"/> Accounts drawn up to the year-end</li> <li>• Tax deducted at source via the Construction Industry Scheme</li> </ul>
Capital gains	<ul style="list-style-type: none"> <li>• Evidence of asset acquisition and disposal values (e.g. property, land, shares etc.)</li> <li>• Evidence of asset improvement and transaction costs</li> <li>• 'Windfall' receipts from building societies/ insurance companies</li> <li>• Sales of shares acquired under Company share options</li> </ul>
Income from land & property <i>(Including the let of part of your main home)</i>	<ul style="list-style-type: none"> <li>• Income from let property and related expenses (ideally detailed on an Excel spreadsheet)</li> <li>• Mortgage statements (showing interest portion)</li> <li>• Is the property jointly held? <ul style="list-style-type: none"> <li><input type="checkbox"/> Please distinguish purchases of new furnishings from replacement items</li> </ul> </li> </ul>
Investment income <i>(Excluding ISAs)</i>	<ul style="list-style-type: none"> <li>• Interest statements (Is the account jointly held?)</li> <li>• Dividends vouchers <ul style="list-style-type: none"> <li>• Chargeable event certificates from investment bonds</li> </ul> </li> </ul>
Overseas employment and pensions <i>(UK residents are taxed on their <b>worldwide</b> income)</i>	<ul style="list-style-type: none"> <li>• Payslips</li> <li>• Bank statements (showing earnings deposited)</li> <li>• Employer's statement of earnings <ul style="list-style-type: none"> <li>• Employer's statement of foreign tax paid</li> </ul> </li> </ul>
Overseas investments <i>(UK residents are taxed on their <b>worldwide</b> income)</i>	<ul style="list-style-type: none"> <li>• Income from savings, property, shares and other investments abroad</li> </ul>
Child benefits	<ul style="list-style-type: none"> <li>• Child benefits received (Required if you or your partner have gross income of more than £50,000)</li> <li>• Are you the higher earner?</li> <li>• Total received in the year and for how many children?</li> </ul>
Pension income	<ul style="list-style-type: none"> <li>• State pension (weekly rate)</li> <li>• Private pension (P60)</li> <li>• Pension lump sums/drawdowns</li> <li>• Winter fuel allowance</li> </ul>
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"> <li>• R185 certificate</li> </ul>
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"> <li>• e.g. PPI claims</li> </ul>

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Student loan	<ul style="list-style-type: none"><li>• If you have a student loan are you on plan 1 or 2?</li><li>• Plan 1: Loans taken out Sep-1988 – Sep-2012</li><li>• Plan 2: Loans taken out post Sep-2012</li></ul>
Pension contributions	<ul style="list-style-type: none"><li>• Personal contributions made to a pension scheme</li></ul>
Donations to charities	<ul style="list-style-type: none"><li>• Donations made under the Gift Aid scheme</li></ul>
Marriage allowance	<ul style="list-style-type: none"><li>• £1,260 of the personal allowance can be transferred between married couples</li></ul>
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"><li>• Name of bank</li><li>• Sort code</li><li>• Account number</li><li>• Name of account holder</li><li>• Building society reference</li></ul>

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