

# Self Assessment Tax Return Information Checklist

Start of Tax Year	6th April _____
End of Tax year	5th April _____

Please complete this form so that we can prepare your personal tax return ahead of the 31st January filing deadline.  
Please don't assume we know you have been asked to file a personal tax return for this current tax year. Please tell us one is expected.  
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.  
Please make sure you inform us of any overseas bank accounts or assets you may operate or own respectively.  
To avoid you having to pay a £100 late filing penalty, please assume your tax return has not been filed until you receive a copy of the HMRC's e-filing receipt reference number either directly from the HMRC or from us. If you don't possess the e-filing receipt number please contact us well before the 31st January filing deadline so we can address the matter.  
Please note the HMRC now charge penalties for not paying *Payments on Account* and any tax due on the 31st July/31st January each year.

## A. CONFIRMATION OF YOUR PERSONAL DETAILS

Your first name(s)			
Your last name			
Your UTR (10 digits)			
Your Date of Birth			
Your N.I. number			
Your residential address			
Your postcode			
Spouse's name			Spouse/CP's Date of Birth
Date of Marriage/CP			

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

Please state how much you paid HMRC in respect of the first POA in January.	
Please state how much you paid HMRC in respect of the second POA in July.	
<i>If no payments were made, enter £0.00</i>	

## 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			
Employer's Payroll Reference			
Gross pay received in tax year			
Income Tax deducted in tax year			
2 Employer's name			
Employer's Payroll Reference			
Gross pay received in tax year			

Income Tax deducted in tax year

Y/N

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.

Y/N

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

If 'YES', please give brief details of the change and any additional payments made to you in compensation.

---

### C. OTHER EARNED INCOME

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

Y/N

  

Did you receive any expenses or remuneration from any sports or social clubs you may be involved in?

*If 'YES' please provide details unless we prepare accounts for the activity involved.*

---

### D. INCOME FROM PROPERTIES

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

Y/N

*If 'YES' please provide details.*

---

### 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 state the pension amount received during the year

£

Also please let us know if your spouse received state pension

£

---

### 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*

---

## 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*

1	Bank or Building Society name	<input type="text"/>	
	Account number	<input type="text"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<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"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<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"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<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"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<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"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<input type="text"/>	Was the account in joint names? If so, how many? <input type="text"/>
6	Bank or Building Society name	<input type="text"/>	
	Account number	<input type="text"/>	
	<b>NET</b> interest received	<input type="text"/>	
	Income Tax deducted at source	<input type="text"/>	Was the account in joint names? If so, how many? <input type="text"/>

---

## H. INCOME FROM STOCKS AND SHARES

Did you receive any income of stock issues from the shares you held during the year?  Y/N

*If 'YES' please provide details of the investment income your received during the year*

---

**I. RELIEFS AND ALLOWABLE DEDUCTIONS AGAINST TAXABLE INCOME**

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

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

Did you personally pay into any pension fund during the year?

*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?

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

---

**J. CAPITAL GAINS**

Did you buy, sell or give away any assets subject to Capital Gains Tax regulations?  
e.g. valuable chattels, second homes, buy-to-let properties, garages, land, etc

*If 'YES' please provide details of the purchase or disposals made during the year*

---

**K. GIFT AID ELECTIONS**

Did you make any Gift Aid payments or any charitable covenants during the year?

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

---

**L. High Income Child Benefit Tax Charge**

You may have to pay a tax charge, known as the 'High Income Child Benefit Charge', if you have an individual income over £50,000 and you, or your partner receives Child Benefit.

If you or your partner's individual income is likely to exceed £50,000, please advise us of the:

The number of children you have

The total amount of Child Benefit you have or will receive in the tax year. £

---