



2019/2020 Self Assessment Checklist



lawrence
grant

lawrencegrant.co.uk

CONTACT INFORMATION

Name

Address 1

Contact number

Address 2

National insurance No.

Town

County

Postcode

Please note that where we have prepared your return in the past we can also produce a report showing what was included on your last return as an aide- memoire.

Please collect all original/copies of certificates and relevant papers together, and send them to us with this checklist and once we have completed your tax return we will return the documents to you for safekeeping.

INCOME

Employment income

(Including directorships with details of P11d benefits received. Any PAYE coding notices for 2019/20 received from HMRC.)

GROSS

TAX DEDUCTED

£

£

Self-employment income

(If we prepare your accounts from information already given to us, please ignore this)

£

£

State pension

(You will have received a notice from DWP)

£

£

Other pensions

(You will have received a P60 or tax certificate)

£

£

Social security or child benefits

Note higher rate tax payers may have to repay child benefit received, even if paid to their partner

£

£

INCOME FROM UK PROPERTY

Provide details of income and expenses

Rents receivable for all months arising in the year.

£

Expenses incurred

e.g. maintenance, repairs, renewals, agents fees, service charges, ground rent.

£

Mortgages

Please provide name of lender(s) and certificate of interest paid. State joint or sole and provide total figures.

£

INCOME FROM PROPERTY ABROAD

Provide details of income and expenses

Rents receivable for all months arising in the year.

£

Expenses incurred

e.g. maintenance, repairs, renewals, agents fees, service charges, ground rent.

£

Mortgages

Please provide name of lender(s) and certificate of interest paid. State joint or sole and provide total figures.

£

OTHER INFORMATION

DETAILS AND VALUES

Mortgages and other loans for business and rental purposes

Provide name of lender(s), repayments made and interest paid

Pension contributions paid

Give details of pension scheme, and contributions made

Gift aid donations

Give details of beneficiaries and amounts paid

Other tax deductions

Eg Enterprise Investment Schemes, Venture Capital Trusts etc

Student loans

If you have outstanding debt relating to student loans please provide correspondence of outstanding amounts and any amounts repaid in the year

Spousal allowance transfer

If you or your spouse have not used all of your personal allowance there may be scope to transfer part of it. Please provide us with your spouses income details if you think this is relevant

£

National insurance for the self employed

Where your income is below the NI limits, you may not be required to pay Class 2 NI but you may want to pay it voluntarily to get pension/ benefit credits. Do you wish to do this?

Yes

No

Personal Circumstances

Give details of changes in circumstances from previous year including marriage, civil partnership, separation, divorce. If Lawrence Grant does not deal with your spouse or civil partner's tax affairs, please can you confirm if their income is under £12,500 for 2019/20.

Marriage

Civil Partnership

Separation

Divorce

ADDITIONAL INFORMATION

In the space below please give any other information or comments that you feel is relevant to your tax return, including any changes in personal circumstances since the last tax return or in the current year.

BANK DETAILS FOR ANY REFUNDS YOU MIGHT BE DUE

Once calculated, if you are due a Self-Assessment Tax Refund for the tax year, it can be paid directly into your bank account. Please provide details of your bank below (we need you to confirm this each year).

Account name	<input type="text"/>	Bank name	<input type="text"/>
Account No.	<input type="text"/>	Sort code	<input type="text"/>