

2019/2020 Self Assessment Checklist



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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

| | GROSS | TAX DEDUCTED | | | |
|---|----------------------|--------------|--|--|--|
| Employment income | £ | £ | | | |
| (Including directorships with details of P11d benefits received. Any PAYE coding notices for 2019/20 received from HMRC.) | | | | | |
| 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. | | £ | | | |
| o.g. maintenance, repairs, renewais, agents rees, service charges, ground rent. | | | | | |
| Mortgages | | £ | | | |
| Please provide name of lender(s) and certificate of interest paid. State joint or sole and pro | ovide total figures. | | | | |

SAVINGS AND INVESTMENTS

The following should have tax certificates/vouchers:

| | GROSS | NET RECEIVED | TAX DEDUCTED |
|--|-------|--------------|----------------|
| Bank & Building Society interest (excl. ISAs) National Savings | £ | £ | £ |
| Income from unit trusts | £ | £ | £ |
| Other interest received. Interest on any compensation payments received (e.g. PPI claims). | £ | £ | £ |
| Dividends received (including Scrip dividends) | £ | £ | £ |
| Chargeable event certificates from bond withdrawals/surrender | £ | £ | £ |
| CHARGEABLE GAINS | | | |
| Give details of any assets disposed of in year | £ | £ | £ |
| OTHER INCOME | | | |
| Give details of any other income not listed above Including from Trusts and Estates (R185 certificates required), and Gifts of cash or assets. | £ | £ | £ |
| INCOME FROM OVERSEAS | | | |
| Please list all types of income Even if taxed abroad you may also have to pay tax on this income in the UK. We will also need details of amounts and dates foreign taxes were paid. | £ | £ | £ |
| RESIDENCY DETAILS | PLACE | ARRIVAL DATE | DEPARTURE DATE |
| If you have spent time overseas, or have recently become a UK resident please provide details of dates spent in each country. | | | |
| | | | |

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 allowan provide us with your spouses income details if you think this is | | £ | |
| National insurance for the self employed Where your income is below the NI limits, you may not be requi voluntarily to get pension/ benefit credits. Do you wish to do th | | Yes No | |
| Personal Circumstances | Marriage | Civil Partnership | |
| Give details of changes in circumstances from previous year in civil partnership, separation, divorce. If Lawrence Grant does n spouse or civil partner's tax affairs, please can you confirm if the under £12,500 for 2019/20. | not deal with your 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).

Bank name

Sort code

Account name

Account No.