

Tax return checklist 2017/2018

Name: _____

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

	Net received	Tax deducted	Gross
Employment income (including directorships) This can be taken from your P60/P45 (Include details of P11d benefits received. Any PAYE coding notices for 2016/17 received from HMRC).			
Self-employment income (If we prepare your accounts from information already given to us, please ignore this)			
Pension income 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 property Provide details of income and expenses. (include property situated in the UK and/or abroad) 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.			
Savings and investments The following should have tax certificates/vouchers: 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			

<p>Chargeable gains Give details of any assets disposed of in year</p>			
<p>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.</p>			
<p>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.</p>			
<p>Residency details If you have spent time overseas, or have recently become UK please provide details of dates spent in each country.</p>	<p><u>Place</u></p>	<p><u>Arrival date</u></p>	<p><u>Departure date</u></p>

**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, Research and Development 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?	
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 £11,500 for 2017/18.	

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: _____
Bank name: _____
Account number: _____ Sort Code: _____