

Tax Return Check List

Personal Details

Name:
Address:
Contact Telephone Number(s):
Email Address:
Date of Birth:
National Insurance No:

Income

Primary Employment
Car Benefit & Other Benefits in Kind
Income from Self-Employment or Partnership
Social Security Benefits
State Pension and Other Pensions
Shareholdings & Dividends
Trusts and Settlements
Land and Property
Foreign Income
Other Income

Reliefs

Give as you earn
Pension contributions
Alimony or maintenance paid (only if born before 6.4.35)
Gift aid contributions
Covenanted payments to charities
Payments in respect of venture capital trusts
Enterprise investment scheme payments

Allowances

Primary Employment
Car Benefit & Other Benefits in Kind
Income from Self-Employment or Partnership
Social Security Benefits
State Pension and Other Pensions
Shareholdings & Dividends
Trusts and Settlements
Land and Property
Foreign Income
Other Income

Additional Information

Please provide us with any other information concerning your income; reliefs or allowances which, you feel, may be relevant to your Tax Return.

If you have disposed of any assets, shareholdings or other items (excluding motor cars) please provide details and include certificates/broker's schedules as appropriate.

Please provide details of the above with supporting documentation as necessary, i.e. P60, interest certificates, dividend vouchers.