

Name: _____

Income

| | Net received | Tax deducted | Gross |
|--|--------------|---------------------|-----------------------|
| Employment income (including directorships) This can be taken from your P60/P45 (Include details of P11d benefits received too) | | | |
| 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 Please provide details of income and expenses | | | |
| Savings and investments The following should have tax certificates/vouchers: Bank & Building Society interest (excl. ISAs) National Savings Other interest received Dividends received (including Scrip dividends) Income from unit trusts | | | |
| Chargeable gains Give details of any assets disposed of in year | | | |
| Other income Give details of any other income not listed above (If you've had PPI payments in the year we will need this information) | | | |
| 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 that foreign taxes were paid. | | | |
| Residency details If you have spent time overseas, or have recently become UK please provide details of dates spent in each country | <u>Where</u> | <u>Arrival date</u> | <u>Departure date</u> |

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? | |

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: _____