

TAX RETURN CHECKLIST

Tax Year

6 April 2018 – 5 April 2019

Name:

Email:

INCOME

During this tax year, please confirm if you received any of the following income, and if yes, provide relevant details. Feel free to email copies of the relevant documents.

Employment Income

Yes No

Employer Name	PAYE Reference	Gross	Tax
		£	£
		£	£
		£	£

If you received any benefits or expenses from the employer please email a copy of your P11d.

Dividend Income

Yes No

	£
Or, please calculate this for me from my accounting records	Yes <input type="checkbox"/> No <input type="checkbox"/>

Dividends received from any other company

Company Name	Net Dividend
	£
	£
	£

Self-Employment Income

Yes No

Please calculate this for me from my accounting records	Yes <input type="checkbox"/> No <input type="checkbox"/>
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Bank/Building Society Interest (excluding. ISA's)

Yes No

Bank Name / Account Number	Gross	Tax	Net
	£	£	£
	£	£	£
	£	£	£
	£	£	£

Pensions Received

Yes No

Pension Provider	Gross	Tax	Net
	£	£	£
	£	£	£

Capital Gains

Yes No

Please provide details:

Rental Income

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Property 1				Property 2					
Furnished?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Furnished?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Address				Address					
Postcode				Postcode					

Rent Received	£	Rent Received	£
Agent Commission Paid	£	Agent Commission Paid	£
Mortgage Interest Paid	£	Mortgage Interest Paid	£
Insurance	£	Insurance	£
Maintenance Costs	£	Maintenance Costs	£
Other (please specify)		Other (please specify)	
	£		£
	£		£
	£		£

Child Benefit

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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RELIEFS AND DEDUCTIONS

During this tax year, please provide relevant details for the following reliefs and deductions. Feel free to email copies of the relevant documents.

Pension Contributions (did you pay into a pension personally?)

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Pension Provider	Gross	Tax	Net
	£	£	£
	£	£	£

Gift Aid Donations

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Charity	Donation
	£
	£
	£

Student Loan (do you have an income contingent student loan?)

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Any other information

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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