

tax return information

This document is extracted from my full 'personal tax information pack' Please request a copy if you need me to help you with your tax.

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contains:

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tax return information

(2 pages)

Not all these points may apply to you however, it is important you consider them all if there have been changes to your circumstances since your last return.

Include your details on these pages or send copies / your notes detailing this information.

income

- Earned income from employment (P60 or P45), including termination payments and Benefits-in-kind (P11D) and any taxes paid.
- Income from your trade or business or copy accounts if already prepared.
- Income from Pensions or Annuities.
- Investment / deposit account interest, e.g. from banks, building societies, National Savings Bank, stockbroker, including closed accounts with a note of the interest at date of closure and details of any new accounts opened including the date opened, account number and branch. Please indicate whether received net or gross and any taxes deducted.
- Dividend and interest tax vouchers or stockbrokers annual tax report. Include number of shares held and details of any recent acquisitions or changes.
- Any income from abroad. Please indicate whether any local taxes have been deducted.
- Receipts from the estate of a deceased person or as a beneficiary of a trust as stated on Form R185.
- Receipts from insurance bond and other annuity arrangements.
- Property income, e.g. furnished or unfurnished lettings, including details of all expenses and dates of occupancy if any Let property was ever your only or main residence.
- Commissions, gains on surrender of life insurance policies, alimony or maintenance.

outgoings

- Expenses attributable to Employment or Earned income, including professional subscriptions and any Motor expenses not reclaimed from you over and above the HMRC allowed rates.
 - Expenses attributable to your trade or business or copy accounts if already prepared.
 - Personal pension premiums, Self Invested Pension Premiums and Additional Voluntary Contributions or Retirement Annuity Premiums.
 - Gift aid donations, net payments under deeds of covenant and duration of covenant.
 - Payments of maintenance or alimony.
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capital gains

- Stockbrokers' contract notes for purchases and sale of quoted stocks and shares, including any sales and subsequent repurchases of shares.
 - New offers and issues: e.g. privatisation, demutualisations, rights issues, public offers.
 - Purchases, sales and gifts of other assets, e.g. houses, land, unquoted stocks & shares etc.
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PAYE notices of coding

- Pay As You Earn (PAYE) notices of coding and details of any tax already refunded during the year or previous or later years tax liabilities being collected in this year so that your tax payments throughout the year can be calculated correctly.
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If there are other details you think would be relevant or helpful in managing your tax affairs please include these also.

your notes

(if required)