



## 2017 Tax Return Checklist

Details	Enclosed	N/A	To follow
<u>Form P60</u> , certificate of pay and tax deducted, in respect of each employment held.			
<u>Form P11D</u> , form detailing benefits and expenses relating to employment.			
<u>Self-employment income</u> , details of any sole trader or partnership income and expenses during the year.			
<u>Student loans</u> , details of any outstanding student loans including the date you started university. If you have your most recent statement please can you provide this.			
<b><u>Child Benefit</u>, if you or your partner are in receipt of child benefit, please confirm the amount received and the number of children this relates to.</b>			
<u>Pensions</u> , details of state pension and P60 from any private pensions.			
<u>Rental Income</u> , details of any rental income received, along with any related expenses.			
<u>State benefits</u> , details of any state benefits received including jobseekers allowance.			
<u>Bank/building society interest</u> , details of interest paid into your accounts during the year ( <u>including any PPI interest</u> ).			
<u>Dividends</u> , details of all share holdings and dividends paid during the year.			

<p><u>Trust or settlement income</u>, you should receive a tax certificate in relation to this income.</p>			
<p><u>Overseas income</u>, details of any income received from abroad.</p>			
<p><u>Investments bought or sold</u>, details of any assets bought, sold or gifted during the year.</p>			
<p><u>Any other income</u>, details of any income received from any other source.</p>			
<p><u>Pension contributions</u>, details of any personal payments made into a pension scheme. <b>It is vital that you also provide details of employer contributions if combined contributions exceed £20,000.</b></p>			
<p><u>PPI interest</u>, details of any interest received as a result of a PPI compensation claim.</p>			
<p><u>Gifts to charity</u>, details of any donations made under the Gift Aid Scheme.</p>			
<p><u>Marriage allowance</u>  Are you married and does your partner earn less than £11,000?  If so please provide details of their earnings for 2016/17</p>			
<p><u>Any other reliefs</u>, details of any interest paid on qualifying business loans and investments into EIS, venture capital, or any other schemes.</p>			

