

## LIST OF INFORMATION REQUIRED FOR SELF-ASSESSMENT TAX RETURN 2017

- 1) Details of income from employment.  
  
Form P60 'Statement of earnings'  
Form P11D 'Return of Benefits if applicable.'  
Copies of any forms P45 received when leaving an employment.  
Names and addresses of any employers you do not have the above details from. Can you also please let me know the relevant dates of commencement and cessation. This should enable me to obtain the necessary income from H M Revenue & Customs.
  
- 2) Details of any taxable UK pensions or annuities pension received. Please supply form P60 or certificate or statement of earnings issued for the period. Alternatively the pension supplier may send you a letter confirming the amount received where no tax has been deducted.
  
- 3) Details of the weekly/4weekly amount of State Retirement Pension received between 6th April 2015 and 5<sup>th</sup> April 2016.
  
- 4) Details of any income from UK savings & investments.  
  
Bank/ Building Society interest- Please supply interest summaries or bank statements.  
  
Dividend/Unit Trust income - Please supply the tax vouchers issued or alternatively the booklet issued by the person managing your portfolio.  
  
Where Bank/Building society accounts have been opened or closed during the year ended 5<sup>th</sup> April 2016 please let me have the dates of opening and closure in addition to the interest details.
  
- 5) Details of any gains arising on UK life policies. A 'chargeable event' certificate will have been issued on the surrender/ partial surrender that took place.
  
- 6) If you are Self Employed, please supply all records of income and expenditure including Bank Statements, Cheque Book Stubs, Paying-in Books, Sales Invoices and Purchase Invoices.
  
- 7) If applicable - details of income from Land and Property, including rental income and related expenditure, and details of any rental properties acquired or disposed during the year ended 5<sup>th</sup> April 2016.

cont

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- 8) For investments and other assets subject to Capital Gains Tax that have been sold during the year, details of:
  - ) description of asset
  - ) sales proceeds
  - ) date sold
  - ) purchase cost plus any enhancement expenditure incurred in the case of disposal of buildings
  - ) date purchased
  - ) for any other capital receipts received during the year together with any documentation received with the receipt so it can be determined whether it is taxable and if so liable to income tax or capital gains tax
  
- 9) Details of any other sources of income that you have not entered elsewhere on the return (regardless of whether it has been taxed at source or not)
  
- 10) The amount of Child Benefit you or your partner received during the year ended 5<sup>th</sup> April 2016 together with the number of children you were entitled to claim for during the period.

I also need to know if:

- 1) You want to claim relief for pension contributions; please let me have details of amount paid into the pension(s) and the name of the Pension Provider(s).
- 2) You want to claim reliefs for Maintenance, Gift Aid etc. Again, please supply details of amount paid and, for Gift Aid, the name of the Charity.
- 3) You are repaying a Student Loan