

2018/19 Tax Return Checklist

For the period from 6 April 2018 to 5 April 2019

Name:	DoB:
Address:	Email:
	Mobile Phone Number:
	Home Phone Number:

Did you receive any of the following?

1	Employment income? <i>Please provide us with a copy of the P60/P45 you received from your employer(s) and your March 2019 payslip.</i>	Notes:
2	Employment benefits? <i>Please provide us with a P11D issued by your employer. If you haven't received a P11D, please could you describe the benefits received and the corresponding value in the notes section provided.</i>	Notes:
3	Self employed income? <i>Please provide us with further details if you have not already done so.</i>	Notes:
4	Partnership income? <i>Please provide us with further details if you have not already done so.</i>	Notes:
5	Dividend income? <i>Please provide us with the dividend vouchers you received or copies of a summary from your share portfolio.</i>	Notes:
6	Interest? <i>Please provide us with copies of the interest certificate you have received from your interest provider. We do not need details of tax exempt savings such as ISAs.</i>	Notes:
7	State pension or other state benefits? <i>Please provide us with details of either the weekly or 4-weekly amount received as well as the dates you started (and/or stopped) receiving the benefit(s).</i>	Notes:
8	Pension income? <i>Please provide us with a copy of the P60 you received from your pension provider.</i>	Notes:
9	Foreign income? <i>Please use the notes section provided to supply us with further details.</i>	Notes:
10	Income from a trust or deceased estate? <i>Please use the notes section provided to supply us with further details.</i>	Notes:
11	Redundancy or compensation payments? <i>Please use the notes section provided to supply us with further details.</i>	Notes:

12	Taxable pension income or lump sums?		Notes:
	<i>Please use the notes section provided to supply us with further details.</i>		

Throughout the tax year, have you...?

13	...made any Gift Aid donations?		Notes:
	<i>Are you also likely to make any large Gift Aid Payments before 31 January 2020? Please use the notes section provided to supply us with further details.</i>		
14	...gifted any shares or property to charity?		Notes:
	<i>Please use the notes section provided to supply us with further details.</i>		
15	...gifted or sold any assets in the year?		Notes:
	<i>Please use the notes section provided to supply us with further details.</i>		
16	...had any 2018/19 income tax refunded in the year?		Notes:
	<i>Please use the notes section provided to supply us with further details.</i>		
17	...made any other payments eligible for tax relief?		Notes:
	<i>Examples of this could be payments made through the Enterprise Investment Scheme, Venture Capital Trusts or interest on loans to companies.</i>		

Do any of the following relate to you?

18	Personal Pension Contributions		Notes:
	<i>If you have made any personal pension contributions, please provide us with details of the total contributions made in the tax year. (If you contributed through your employment this amount can be found on your payslips).</i>		
19	Employer's Pension Contributions		Notes:
	<i>If your employer has made any pension contributions on your behalf, please provide us with details of the total contributions made in the tax year. This can be found from your payslips but your employer should be able to provide you with a summary.</i>		
20	Underpayments included in 2018/19 tax code		Notes:
	<i>If you were employed in 2018/19 and your tax code included underpayments for an earlier year, please provide us with a copy of your tax coding notice for the 2018/19 tax year.</i>		
21	Employee share schemes		Notes:
	<i>If you are a member of an employee share scheme, please use the notes section provided to supply us with further details.</i>		
22	Student loan		Notes:
	<i>If you took out a student loan, can you confirm in the notes section provided whether this was taken out before or after April 2012 and the total amounts deducted by your employer?</i>		

23	Child benefit		<i>Notes:</i>
	<i>If you or your partner were in receipt of child benefit and also received total income exceeding £50,000, can you confirm the total amount received in the year as well as the number of children that this was in respect of?</i>		
24	Would you like to make a Marriage Allowance Transfer?		
	<i>If your taxable income for the year was less than £11,850, you can transfer £1,185 of your personal allowance to your spouse or civil partner. If you would like to make the transfer, please provide us with the following information.</i>		
	Partner's full name:		
	Partner's NI number:		
	Partner's Date of Birth:		
	Date of marriage or civil partnership:		
	Were you both born on or after 6 April 1935?:		
Were you married to, or in a civil partnership with, the same person for all or part of the tax year?:			

Additional Checklists	
<i>Could you please let us know which of the following checklists you have also completed?</i>	
Rental Property Supplementary page	
Residency Checklist	
Medical Practitioners Checklist	

Additional Information	
<i>If you have any further comments or anything you would like us to contact you about, please let us know in the notes section below.</i>	