

# TAX RETURN INFORMATION CHECKLIST

GET READY FOR YOUR ACCOUNTANT



## NOTES

- TAX YEAR 2017 COVERS 6 APRIL 2016 to 5 APRIL 2017
- YOUR ACCOUNTANT NEEDS INFO FOR THE YEAR 6 APRIL 2016 TO 5 APRIL 2017
- YOUR TAX RETURN FOR 2017 IS DUE 31 JANUARY 2018

## PERSONAL INFO

- Your Full Name, Address & Date of Birth
- Your National Insurance Number
- Your UTR Number
- Student Loan Details & Statement
- Details of Tax Payments Made & HMRC Correspondence

## SAVINGS & DIVIDENDS

- Dividend Certificates
- Savings Account Statements or interest certificates (excl. ISAs)

## EMPLOYMENT INCOME

- P45 and/or P60
- P11d

## SELF EMPLOYMENT EARNINGS

- Business Bank Statements
- Sales Invoices sent to Customers
- Supplier Invoices & Business Receipts
- Cash Expenses & Receipts for costs paid personally
- Mileage Claims for Business Travel
- Stock List at Year End
- Use of Home Claim

## RENTAL PROPERTY INCOME

- Rental Income & agreements
- Mortgage statements
- Managing Agent Statements
- Expense claims eg: travel
- Service charges paid
- Expenses paid eg: repairs, cleaning

## RELIEFS & ALLOWANCES

- Gift Aid payments
- EIS investments
- Maintenance payments
- Pension Contributions
- Prior Year Losses
- Marriage Allowance

## OTHER INCOME

- Sale of Share, Property & Land
- Gifts
- Any other income
- Foreign Income