



For Accountancy Firms

## SELF ASSESSMENT

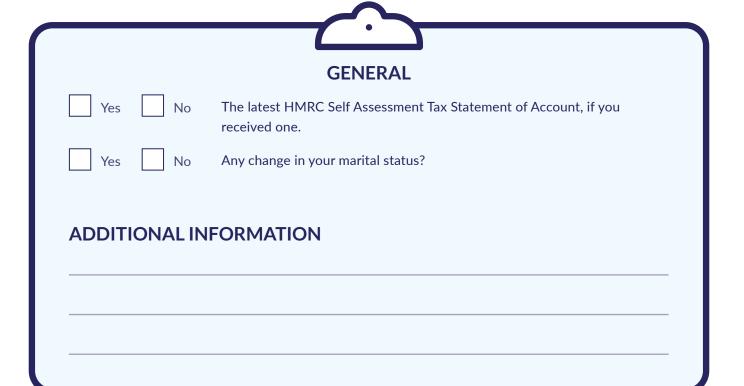
**Tax Return Checklist** 



Before you begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you and make sure you have gathered all your slips, receipts, and tax documentation. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder.

## **BASIC INFORMATION**

Full name	DOB
NI number	NI number
UTR	Contact details
Address	
	-
	-



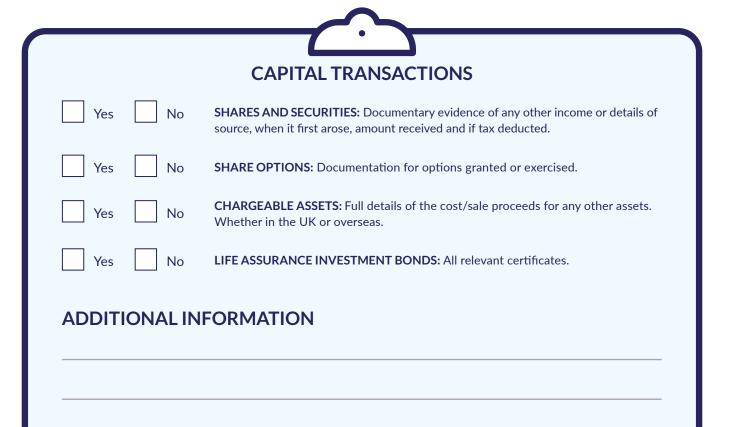


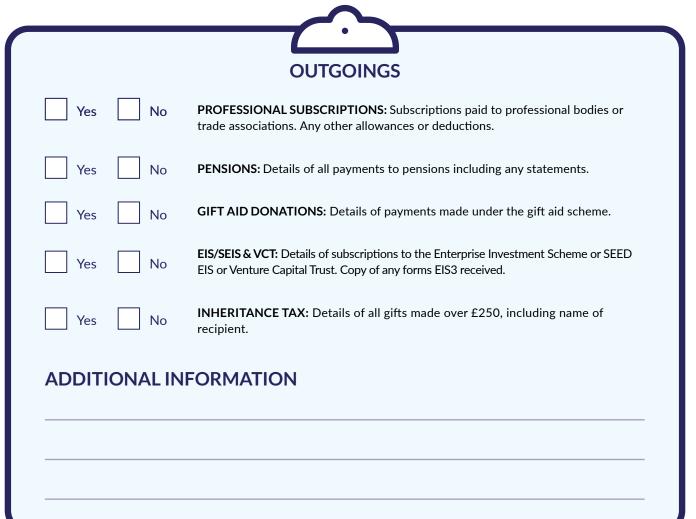
### **INCOME**

Yes	No	<b>EMPLOYMENT INCOME</b> Form P60, P45, copy of P11D. Details of any taxable lump sums; fixed deductions from employment, redundancy payments and any student loan deductions.
Yes	No	Are you a director or office holder?
Yes	No	<b>SELF-EMPLOYMENT &amp; PARTNERSHIP:</b> Accounting paperwork for your Accounting Period that ended in this tax year. Details of income and expenses arising or business accounts together with a note of any capital additions or disposals.
Yes	No	CIS SUBCONTRACTOR: All tax statements from Contractors between 6th April and 5th April in addition to Self Employment records.
Yes	No	<b>PENSIONS:</b> State Pension, private pensions and overseas pensions received, during the tax year.
Yes	No	<b>BENEFITS</b> State benefits or allowances received, during the tax year. Jobseekers allowance
Yes	No	Child Benefit received by you or your partner (including any paid to someone else for a child, that lives with you), the number of children this was applicable to and your partners income and the date it ceased, if applicable.



INCOME		
No	<b>INCOME FROM PROPERTY:</b> Details of any rental income, rental statements and mortgage statements for the tax year including interest paid.	
No No	BANK/BUILDING SOCIETY ACCOUNTS: Interest received on any accounts from statements or certificates of interest received from your bank. Please indicate any Joint Accounts and enter your share of the income (include any interest received from PPI repayments).	
No	<b>UK DIVIDENDS:</b> Dividend vouchers and scrip dividend vouchers (where shares received in lieu of whole or part of dividend). Details of all UK shares held.	
No	FOREIGN INCOME Interest received on any foreign accounts. Dividend vouchers from any foreign holdings, details of all foreign shares held (amounts in Sterling).	
No	Foreign employment payslips covering the tax year. Details & dates overseas.	
No	Any other received or remitted income from overseas.	
No	<b>LIFE INSURANCE POLICIES:</b> Income from insurance policies or deceased persons estates.	
No	<b>OTHER SOURCES:</b> Documentary evidence of any other income or details of source, when it first arose, amount received and if tax deducted.	
IONAL IN	FORMATION	
	No           No           No           No           No           No           No           No	







## **OTHER RELIEFS**

Yes No Post-cessation expenses, pre-incorporation losses, losses on relevant discounted securities  ADDITIONAL INFORMATION	Yes	No	SHARES AND SECURITIES  Qualifying maintenance paid to a former spouse or civil partner
ADDITIONAL INFORMATION	Yes	No	
	ADDIT	IONAL IN	FORMATION

# **Tax?** Relax!

Find out how QXAS can help take the stress out of this tax season

**GET IN TOUCH** 

Email us at qxas@qxglobalgroup.com or call us on +44 208-146-0808



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