

Typical Information Required for your Tax Return

Earnings	Copies of Forms P60 and P11D Details of any share options	
State and other Pensions	State pension statement, P60's or similar documentation for the year.	
All other state benefits	Full details are required including any supporting documents.	
Investment Property Income	Rental statements - details of all rental income and expenses with copy invoices for all investment properties held.	
Bank and Building Society Interest	Interest certificates, bank statements, passbooks, etc (Don't forget interest on current accounts and any offshore accounts).	
Dividends etc	Dividend and interest counterfoils, contract notes and details of rights/ bonus issues.	
High Income Child Benefit Charge	If you have children and claim the 'family allowance' please make us aware of who is in receipt of the family allowance and how many children you claim for. We can then calculate whether any amounts are owed back to HMRC due to earnings levels.	
Maintenance Payments	Copies of new orders and details of all payments made or received during the year.	
Trust Income	Forms R185 or a copy of the Trust accounts.	
Annuities, chargeable events and gains on life policies.	Chargeable event certificates or similar supporting documentation.	



Employment Expenses	All details and any supporting documents.	
Loans for shares in or money introduced to your company or partnership	A note of all loans existing during the year with supporting documentation including interest certificates obtainable from lenders.	
Disposal of any valuable assets including principal private residence.	Full details including completion statements, contract notes and other documentation (if not dealt with under dividends, etc).	
Charitable, covenants, and gift aid.	Full details	
Other information	Spouses Christian name, dates of birth (self and spouse). Names & dates of birth of all children & confirmation of where they reside.	
Blind persons	Date of registration and local authority with which registered.	
Pension policies	Full details of payments during year, with supporting pension premium certificates if new policies have been affected or existing premiums increased.	
EIS or VCT investments	The relevant tax certificates provided by the company.	
Any other matters	Details of any other income/outgoings which may have a bearing on your tax return.	

If you would like further information or advice, please contact the Sence Team on **01530 267 320** or email info@senceaccounting.co.uk

