

## Typical Information Required for your Tax Return

<b>Earnings</b>	Copes of Forms P45, P60 and P11d Details of any share options	
<b>Employment Expenses</b>	All details and any supporting documents Uniforms, subscriptions, mileage	
<b>Pension policies and excess charges</b>	Full details of pension contributions made during the year, with supporting pension premium certificates if new policies have been affected or existing premiums increased. Details of any excess contribution charges linked to taxation	
<b>Charitable donations, covenants and gift aid</b>	Full details	
<b>Blind Persons</b>	Date of registration and local authority with which registered	
<b>State and other Pensions</b>	State pension statement, P45's, P60's or similar documentation for the year	
<b>All other state benefits</b>	Full details are required including any supporting documents	
<b>High income Child Benefit Charge</b>	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. Who is the higher earner of the family. We can then calculate whether any amounts are owed back to HMRC due to earnings levels	
<b>Bank and Building Society Interest</b>	Interest certificates, bank statements, passbooks, etc (Don't forget interest on current accounts and any offshore accounts)	
<b>Dividends etc</b>	Dividends and interest counterfoils, contract notes and details of rights/bonus issues	
<b>Investment and Property Income</b>	Rental statements – details of all rental income and expenses with copy invoices for all investment properties held	
<b>Annuities, chargeable events and gains on life policies</b>	Chargeable event certificates or similar supporting documentation	



<b>Trust Income</b>	Forms R185 or a copy of the Trust accounts	
<b>Disposal of any valuable assets including principal private residence</b>	Full details including completion statements, contract notes and other documentation (if not dealt with under dividends, etc)	
<b>Loans for shares in or money introduced to your company or partnership</b>	A note of all loans existing during the year with supporting documentation including interest certificates obtainable from lenders	
<b>EIS or VCT investments</b>	The relevant tax certificates provided by the company	
<b>Maintenance Payments</b>	Copies of new orders and details of all payments made or received during this year	
<b>Other information</b>	Spouses Christian name, dates of birth (self and spouse) Names and dates of birth of all children and confirmation of where they reside	
<b>Any other matters</b>	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 267320 or email [info@senceaccounting.co.uk](mailto:info@senceaccounting.co.uk).

