



Typical Information Required for your Tax Return

Earnings	Copies of forms P45, P60 and P11d's . Details of any share options etc.	
Employment Expenses/ Allowances	Provide all details and supporting documents. Uniform cleaning, professional subscriptions, mileage paid for personally and not reimbursed.	
Student Loans	Details if you have a Plan 1 or Plan 2 student loans (or both) in place along with how much has been repaid.	
Pension Contributions and Excess Charges	Full details of pension contributions made during the year, with supporting paperwork. Details of new policies have been taken out or existing premiums increased. Details of any excess contribution charges where tax needs to be paid over via self-assessment.	
Charitable donations, covenants and gift aid	Amounts paid, who to and dates paid required. Also if gift aid has been claimed.	
State and other Pensions received	State pension paperwork, P45's, P60's or similar documentation for the year.	
All other state benefits	Full details are required including any supporting documents to ensure all taxable benefits are accounted for.	
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? -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.	
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 certificates, contract notes and details of rights/bonus issues.	
Investment and Property Income	Rental statements - details of all rental income and expenses with supporting paperwork for all investment properties held.	
Annuities, chargeable events and gains on life policies	Chargeable event certificates or similar supporting documentation.	



Trust Income	Forms R185 or a copy of the Trust accounts.	
Chargeable Gains (Asset sales)	Full details including completion statements, contract notes and other documentation as needed.	
Loans for shares in and/or money introduced to your company or partnership	Details of all loans existing during the year with supporting documentation including interest certificates obtainable from lenders.	
EIS or VCT investments	The relevant tax certificates provided by the investment company.	
Maintenance Payments	Copies of new orders and details of all payments made or received during this year.	
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 267320 or email info@senceaccounting.co.uk.

