

TAX CHECKLIST - YEAR TO 5TH APRIL 2009

1. Details of any earnings (or pensions) and tax deducted, together with Form P60 and P11D, if relevant.
2. Details of any subscriptions paid, mileage or other expenses incurred in connection with your employment which you believe may attract tax relief.
3. Details of any retirement annuity payments or personal pension payments made, together with forms PPPC if any new policies were taken out in the year.
4. Details of any mortgage or loans taken out in the year and certificates of interest paid for old and new borrowings.
5. Details of any Government benefits (e.g. retirement pension, income support, Working Tax Credit, Child Tax Credit, Pension Tax Credit etc.) received.
6. Details of building society interest and bank deposit interest received, and tax paid. If you are making an income tax repayment claim please forward certificates of interest received.
7. Details of any National Savings Bank or other untaxed interest (e.g. Off Shore deposit accounts, etc.)
8. Details of any other untaxed interest (e.g. private mortgage or loan interest) received.
9. Details of any rental income received and expenses paid on property lettings.
10. Details of any dividend income together with dividend voucher counterfoils.
11. A note of any chargeable assets acquired or disposed of (e.g. stocks, shares, land, buildings, etc.) together with relevant contract notes or agents completion statements.
12. Details of any changes in your personal circumstances (e.g. marriage, children, etc.)
13. Details of any monies received from Estates or Settlements together with Form R.185.
14. Details of any insurance investments made during the year or monies received from amounts maturing, together with the chargeable event certificate.
15. Details of any gifts made during the year of over (a) £250 to the same individual or (b) gifts over £3,000.
16. Details of any other amounts (money, shares, property, etc.) given to relatives or third parties during the year.
17. Details of any (a) charitable gifts made during the year (on which you wish to claim gift aid relief) or (b) covenants.
18. Details of any maturing/reinvested or new ISA investments made during the year.
19. Details of any other earned or unearned income received during the year.
20. Details of children 16 or under (18 if in education) for whom you may claim children's tax credit, together with details of your partner/spouse's National Insurance number and income (where we do not act for them).
21. Details of any subscriptions you have made to Venture Capital or Enterprise Investment Schemes during the year.
22. Confirmation, where applicable, that you have put in a claim for 2009/10 for any entitlement to the Child Tax Credit, Working Tax Credit or Pension Credit.

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