

SimpliTax *Self Assessment Tax Experts*

To ensure efficient processing of your Self Assessment tax return by your SimpliTax consultant you will need to provide the relevant documentation mentioned in the checklist below.

Checklist of Information Required to Complete Return

Information Required

Year ended 5th April, 2013

Employment(s)

- ▶ Salary and tax paid
(form(s)P60 or P45 or March Payslip)
- ▶ Benefits and Expenses
(form(s)P11D)

Pensions

- ▶ Occupational
(forms(s)P60 or Certificate of Pension paid)
- ▶ State Pension
(details of pension received)
- ▶ Other taxable benefits
(details of amounts received including taxable lump sums)

Self Employment/Partnership

- ▶ Business profits
(business records of Income and Expenditure)

Taxed Investment Income

- ▶ Interest from Banks and Building Societies
(certificates of interest paid and tax deducted)
- ▶ Dividends from UK Companies/Unit Trusts including Shares/Units in lieu of dividends
(dividend/distribution vouchers)
- ▶ Income from Trusts, Settlements, Deeds of Covenant and Estates
(forms R185 or certificates of income and tax deducted)

Untaxed Investment Income

- ▶ National Savings interest received gross
(statements of interest received)
- ▶ Interest from Banks or Building Societies, received gross
(statements of interest received)
- ▶ Income from Property
(details of income and expenditure or letting statements)
- ▶ Overseas Income - dividends and other
(dividend vouchers and documentary evidence of other income)

Other Income

- ▶ Monies withdrawn from life assurance policies/bonds
(chargeable Event Certificate)
- ▶ Child Tax Credits

Capital Transactions

- ▶ Disposal of only or main residence where partly used for business or over half hectare of ground
(relevant documentation)
- ▶ Disposals where total value exceeds £42400
(relevant documentation)
- ▶ Capital losses to be claimed
(relevant documentation)
- ▶ Net gains exceed £10600
(relevant documentation)
- ▶ Shares/securities bought, sold or take-overs
(contract notes or relevant documentation)
- ▶ Share options
(documentation for options granted or exercised)
- ▶ Property acquisitions and disposals
(details of costs, proceeds, improvement expenditure)
- ▶ Other chargeable disposals, eg: personal property/effects worth over £10100
(details of cost and proceeds)

Outgoings

- ▶ Employment Expenses
(form P11D and details of expenses incurred in employment)
- ▶ Pensions
(forms SEPC/PPCC or receipts for payments to Retirement Annuity or Personal Pension Plans or for AVCs - Additional Voluntary Contributions)
- ▶ Loans and Mortgages
(statements from lender, of interest paid and tax relief given)
- ▶ Gift Aid or Deed of Covenant payments
(copy of details of Covenant)
- ▶ Student Loan Repayments
(details to include amount of payment)
- ▶ Other payments qualifying for tax relief
(details to include amount of payment)