

Name:

Personal Tax Return Checklist 2020/21 (06/04/2020 – 05/04/2021)

Please send this to us with your tax return information.

Item	tick if included
Income: If employed or a director during the year, and we are not responsible for processing your payroll, we will need your P60 or P45 and your P11(D) if appropriate, for each employment in the tax year.	
For sole traders & partnerships where we have not yet prepared your accounts, please provide us with your accounting records	
Details of any income & expenditure on let properties	
Statements of interest from savings/deposit accounts	
Tax certificates for dividends paid on shares	
P60 showing private or occupational pension income and your notification of state pension for this year	
Details of dividends paid as shares, if we have not already discussed this with you	
Income from share options	
Unit trust vouchers	
Details of any income from abroad	
Benefits from pre-owned assets (usually homes sold and continued to live in, you will know if you have this!)	
Details of any income not mentioned (e.g. trusts, maintenance, royalties)	

For help with the checklist or further tax advice please call Sophie or Anthea at our East Grinstead office on 01342836557

Item	tick if included
<p>Tax Relief</p> <p>Personal Pension Contribution Certificate/s</p>	
<p>Statement of Free Standing Additional Contributions (pension)</p>	
<p>Details of Gift Aid and Charitable Donations</p>	
<p>Interest paid on loans to businesses</p>	
<p>Capital gains:</p> <p>Details of any disposal of assets or investments</p> <p>Details of any losses to bring forward which we are not aware of</p>	
<p>Student loans</p> <p>Please enclose your notification.</p> <p>If your employer has deducted student loan repayments enter the amount deducted.</p> <p>Do you think your loan may be fully repaid within the next two years?</p>	
<p>Tax Refund</p> <p>If you think you are likely to be receiving a tax refund please provide us with your Bank Details as follows;</p> <p>Bank name</p> <p>Account name</p> <p>Sort Code</p> <p>Account number</p>	
<p>Your tax return notice</p>	
<p>High Income Child Benefit Charge (if your income is over £50,000)</p> <p>Total amount of child benefit you and your partner received for the year to 5th April 2021</p> <p>Number of children you and your partner were entitled to receive Child Benefit for on 5th April 2021</p> <p>Was your income higher than your partners?</p> <p>There is a HMRC calculator to help you work out the child benefit payments you received at www.gov.uk/child-benefit-tax-calculator</p>	

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Item	tick if included
<p>Marriage Allowance</p> <p>If your income for the year was less than £12,570 you can transfer £1,250 of your personal allowance to your spouse or civil partner, if your spouse or civil partner's income was not taxed at the higher rate. If you would like to do this we will need;</p> <p>Your spouse/civil partner's;</p> <p>Full name</p> <p>National Insurance Number</p> <p>Date of Birth</p> <p>Date of marriage or civil partnership</p>	

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