

Personal Tax Return Checklist for year- ended 5th April 2019

Please tick where applicable then sign the declaration and return to us with all relevant documentation.

Personal Details

Name	
Date of Birth	
NI Number	
Tax Reference Number (UTR)	
Email Address	
Telephone Number	

Income from Employment

(If you are a Dart Services Payroll client, we will already have a copy of your P60/ P11D)

- Were you a director or employee at any time during the year ended 5th April 2019? *If so, please provide the following information:*
- Relevant P60's or P45's for the year ended 5th April 2019.
- Relevant P11D's for the year ended 5th April 2019.
- Details of any expenses you wish to claim against your employment earnings.
- Please supply us with any PAYE coding notices received in respect of the 2018/2019 and 2019/2020 tax years (especially if you are receiving benefits in kind e.g. company vehicle).
- Details of taxable share options or share schemes

Income from Self Employment/ Partnership

- Were you self- employed at any time during the year- ended 5th April 2019? If so, please provide the following information:
- If you have not yet sent us your books and records relating to your accounts for the year that ended on or between 6th April 2018 and 5th April 2019, would you please send these to us as soon as possible?

Please supply us with dates of commencement and cessation during the year ended 5th April 2019 or since then, if applicable.

Social Security Pensions, Benefits and other Pensions

Please supply the following information:

- Details/ Statement of state retirement pension for the year 2018/2019.
- Copies of P60's in respect of unemployment benefit or other state benefits.
- Copies of P60's in respect of pensions from former employer and other pensions.

Land & Property

Did you receive income from land or property, in the UK or abroad? If so, please provide full details of any income and expenditure (including Mortgage Statement's for the year).

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Interest Received

Please provide full details of interest earned on either your own or joint accounts (please indicate whether sole or joint), in respect of the following:

- Building Society
- UK Banks
- National Savings Accounts and Bonds.
- Interest received from Crowd Funding Investments.
- Interest from any other sources, such as PPI, Loan Interest, UK Unit Trusts, Purchased Life Annuity.

Dividends

- Please provide vouchers for Dividends received on either your own or joint shareholdings (please indicate whether sole or joint).
(If the Limited Company is a Dart client we will already have your dividend warrants).

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Other Sources of Income

Please provide us with details of any other income received, such as:

- Overseas Income.
- Details of any gains on life assurance policies.
- Any other income or profits

Personal Pension Contributions

If you have made any such pension payments, would you please provide a statement of contributions paid during the year- ended 5th April 2019, which can be obtained from your pension company?

Chargeable Gains (Capital Gains Tax)

Did you dispose of any chargeable items during the year- ended 5th April 2019?
Please provide us with dates of acquisition and disposal, costs and disposal proceeds.
This would apply to, for instance, land and building and shares.

Sundry Items

- If you received any tax refunds direct from the Revenue relating to the 2017/2018 tax year, can we please have details?
- If you are liable to make Student Loan Repayments for 2018/ 2019 on an Income Contingent Student Loan, can we please have details?
- If you are not 'domiciled' in the UK (i.e. broadly speaking where your permanent home is), or if you are resident in any other country in addition to the UK please provide full details, including the number of days spent in the UK, and abroad during the tax year.
- Do you claim Universal Tax Credits?
- Please provide us with amounts of Child benefit received between 6th April 2018 to 5th April 2019, and number of children claimed for, if your income is over £50,000 and you are the higher earner.
- If you made any gift aid donations or transfers of assets to eligible charities, please let us have details
- If you are married or in a civil partnership, does your partner earn less than their personal allowance (usually £11,850 in 2018/ 2019)?

You must return the signed Checklist to us along with legible or original copies of all paperwork before we can start work on your self- assessment.

Failure to provide all supporting documentation will delay the preparation of your Tax Return and may mean that we cannot guarantee to have it completed by the deadline of 31st January 2020.

We would like to complete your self- assessment as soon as possible; therefore your earliest attention to this matter will be appreciated.

Declaration

Please tick one box

I confirm that I will be preparing my own self- assessment for the year- ended 5th April 2019.

I confirm that the information I have provided is complete and to the best of my knowledge represents all income I received during the year to 5th April 2019. I authorise Dart Services to prepare my self- assessment Tax Return from the details that I have provided.

Print Name:

Signature:

Date:

Note: If you wish Dart Services to complete your self- assessment you must sign and date the above declaration. This must be done even if none of the above questions apply.