

Tax return information checklist

Please would you let us have the following information (**as relevant**) as soon as possible so that your personal tax return can be prepared without any unnecessary delay:

- form **P60 / P45** showing your salary and tax deducted in respect of any employment;
- a copy of form **P11D** showing benefits in kind provided to you in connection with your employment during the year;
- any **PAYE coding notices** received in the year;
- the amount of **state pension** received in the year, together with the current rate of payment;
- details of **other pensions** received in the year;
- details of **rents received and expenses** in respect of any let properties;
- details of **interest** received from bank and building society accounts;
- **dividend** counterfoils and similar vouchers for fixed interest stocks;
- details of outstanding **student loans**;
- details of **child benefits**;
- chargeable event certificates on certain **bonds** and **life assurance** policies;
- forms R185/R185(Trust) showing your income and tax deducted in respect of any settlement of which you are a beneficiary;
- details of any other income arising during the year;
- certificate of interest paid in respect of any other loan on which you obtain, or a new loan which you consider that you may be entitled to, tax relief, with details of the purpose of any new loan;
- details of pension contributions paid in the year (including any paid by an employer on your behalf) and details of the pension scheme in question (including the pension input period);
- details of charitable covenants paid during the year;
- details of payments under Gift Aid during the year;
- details of assets purchased or sold in the year; and
- details of any other transactions which may affect your tax liability.

The above list covers the majority of items which may be taxable, or on which you may receive tax relief. It is unlikely that all the above items will be applicable to you, but it is also possible that there may be items that are not on the list that should be disclosed to HM Revenue & Customs. If in doubt, please provide us with full details.

If you have any queries please do not hesitate to contact us:

T: 01444 416 416 or **E:** support@prismgroup.co.uk