

..... (Please enter your name)

**TAX RETURN INFORMATION  
YEAR TO 5 APRIL 2017**

Please tick appropriate boxes

		Enclosed	Not applicable
<b>INCOME</b>			
1	<b>Self Employed Income</b>	- accounts records, income and expenditure details and supporting documents - payslips and end of year certificates regarding income received under the Construction Industry Scheme	
2	<b>Employment Income</b>	- form P60 from your employer and/or - form P45 from previous employer - details of termination/compensation payments	
3	<b>Benefits in Kind</b>	- expenses and allowances received from your employer, together with a copy of form P11D	
4	<b>Company Share Options</b>	- details of all share schemes in which you are a participator - share options granted/exercised	
5	<b>Income from Land and Property</b>	- income and expenditure details - agents' statements - certificates of loan interest paid - premiums received	
6	<b>Interest Received</b>	- all certificates, statements or passbooks showing interest received - include all accounts opened and closed in the year, with relevant dates	
7	<b>State Pensions</b>	- the amount received, including any lump sum payments (please bear in mind that where pensions are received 4 weekly, there will be 13 payments in the year)	
8	<b>Pensions and Annuities</b>	- certificates of pensions received, and tax deducted	
9	<b>Dividends</b>	- vouchers in respect of dividends received on UK and foreign shares, stocks, warrants and other securities	
10	<b>Other Income</b>	- new sources of income - income from trusts and estates - state benefits - compensation, including interest received on mis-sold financial products such as PPI claims - withdrawals from investment bonds (please forward chargeable events certificates where applicable) - income and chargeable gains from overseas sources (whether remitted or not to the UK)	
11	<b>Pre-Owned Asset Tax</b>	Have you, since March 1986: - given away ownership of assets including property but continued to have the use/occupation of them? - made a gift of money, which was used to purchase assets including property which you use/ live in? - please send relevant details	
12	<b>Child Benefit</b>	- the amount of Child Benefit you/your partner received - the number of children you and your partner received Child Benefit for during the relevant period - please tick this box if your income was higher than your partner's (couples only)	<input type="checkbox"/>

Please tick appropriate boxes

			Enclosed	Not applicable
<b>OUTGOINGS</b>				
13	<b>Pension contributions</b>	Details of payments made to: - personal pensions, retirement annuities, occupational schemes and superannuation schemes  <b>Please forward copies of the pension statements for the year ended 5 April 2017, as issued by the pension scheme administrators</b>		
14	<b>Professional subscriptions</b>	- the name of the organisation - the amount paid and effective date		
15	<b>Gift Aid donations</b>	- the name of the charity - the amount paid and effective date		
16	<b>Student Loan repayments</b>	- please tick this box if you are liable to make Student Loan repayments - amounts repaid in the year via your salary - details of outstanding loans	<input type="checkbox"/>	
17	<b>Alimony and Maintenance</b>	- amounts paid to former spouses - date of relevant court order		
18	<b>Qualifying Loans</b>	- interest paid on qualifying business loans (please provide copies of loan interest certificates)		
19	<b>Share Subscriptions</b>	- subscriptions to Venture Capital Trusts, Enterprise Investment Schemes and Seed Enterprise Investment Schemes		
<b>CAPITAL TRANSACTIONS</b>				
20	<b>Capital Gains</b>	- acquisitions and disposals (by way of sale or gift) of chargeable assets, such as shares, land and property etc. - brokers' contract notes for purchases and sales of stocks and shares. - as regards disposals, details of when the asset was purchased and its cost. - details of shares disposed of and repurchased within 30 days.		
21	<b>Inheritance Tax</b>	- details of all gifts made to individuals and into trusts		
<b>MISCELLANEOUS</b>				
22	<b>Marriage Allowance</b>	- If either spouse's income falls below £11,000, it may be possible to transfer up to £1,100 of the personal allowance to the other spouse. Please tick here if you feel that this may be applicable.	<input type="checkbox"/>	
23	<b>Residence and Domicile</b>	- Are you resident and/or domiciled outside the UK for tax purposes? (If necessary contact us for further information)		
24	<b>HM Revenue &amp; Customs' documents</b>	Please forward: - notices of coding for 2016/17 and 2017/18 - self assessment statements of account		
25	<b>Telephone</b>	- your daytime telephone number - your mobile phone number		
26	<b>e-mail</b>	- Your e-mail address		
27	<b>WW Group Services</b>	- Would you like to be contacted in regard to other services offered by Ward Williams:  <div style="text-align: center;">             Probate &amp; Estate Administration              Inheritance Tax Planning              Retirement Planning           </div>	Yes  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	