



..... (Please enter your name)

**TAX RETURN INFORMATION
YEAR TO 5 APRIL 2018**

Please tick appropriate boxes

		Enclosed	Not applicable
INCOME			
1	Self Employed Income	- accounts records, income and expenditure details and supporting documents - payslips and end of year certificates regarding income received under the Construction Industry Scheme	
2	Employment Income	- form P60 from your employer and/or - form P45 from previous employer - details of termination/compensation payments	
3	Benefits in Kind	- expenses and allowances received from your employer, together with a copy of form P11D	
4	Company Share Options	- details of all share schemes in which you are a participator - share options granted/exercised	
5	Income from Land and Property	- income and expenditure details - agents' statements - certificates of loan interest paid - premiums received	
6	Interest Received	- all certificates, statements or passbooks showing interest received - include all accounts opened and closed in the year, with relevant dates	
7	State Pensions	- the amount received, including any lump sum payments (please bear in mind pensions are generally paid 4-weekly, instead of monthly, so there are 13 payments in the year)	
8	Pensions and Annuities	- certificates of pensions received, and tax deducted	
9	Dividends	- vouchers in respect of dividends received on UK and foreign shares, stocks, warrants and other securities	
10	Other Income	- 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	Pre-Owned Asset Tax	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	Child Benefit	- 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
OUTGOINGS			
13	Pension contributions Details of payments made to: - personal pensions, retirement annuities, occupational schemes and superannuation schemes (please provide details of employee <u>and</u> employer/salary sacrifice contributions) Please forward copies of the pension statements for the year ended 5 April 2018, as issued by the pension scheme administrators		
14	Professional subscriptions (work-related) - the name of the organisation - the amount paid and effective date		
15	Gift Aid Donations - the name of the charity - the amount paid and effective date		
16	Student Loan Repayments - please tick this box if you are liable to make Student Loan repayments, advising whether under Plan 1 or Plan 2 - amounts repaid in the year via your salary - please forward a copy of your latest student loan statement	<input type="checkbox"/>	
17	Qualifying Loans - interest paid on qualifying business loans (please provide copies of loan interest certificates)		
18	Share Subscriptions - subscriptions to Venture Capital Trusts, Enterprise Investment Schemes and Seed Enterprise Investment Schemes		
CAPITAL TRANSACTIONS			
19	Capital Gains - 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.		
20	Inheritance Tax - details of all gifts made to individuals and into trusts		
MISCELLANEOUS			
21	Marriage Allowance - If either spouse's income falls below £11,500, it may be possible to transfer up to £1,150 of the personal allowance to the other spouse. Please tick here if you feel that this may be applicable.	<input type="checkbox"/>	
22	Residence and Domicile - Are you resident and/or domiciled outside the UK for tax purposes? (If necessary contact us for further information)		
23	HM Revenue & Customs' documents Please forward: - notices of coding for 2017/18 and 2018/19 - self assessment statements of account		
24	Contact details - daytime telephone number - mobile phone number - e-mail address		
25	WW Group Services - Would you like to be contacted in regard to other services offered by Ward Williams: Probate & Estate Administration Inheritance Tax Planning Retirement Planning	Yes <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	