

**....................................................... (*Please enter your name)***

**TAX RETURN INFORMATION**

**YEAR TO 5 APRIL 2019**

**Please tick appropriate boxes**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | | **Enclosed** | **Not**  **applicable** |
| 1 | Self EmployedIncome | * 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 & Benefits | - form P60 from your employer and/or  - form P45 from previous employer  - details of termination/compensation payments  - expenses and allowances received from your employer, together with a copy of form P11D |  |  |
| 3 | **Company Share Options** | - details of all share schemes in which you are a participator  - share options granted/exercised |  |  |
| 4 | **Income from Land & Property** | * income and expenditure details * agents’ statements   - certificates of loan interest paid  - premiums received |  |  |
| 5 | Interest Received | - all certificates, statements or passbooks showing interest received  - include all accounts opened and closed in the year, with relevant dates |  |  |
| 6 | 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) |  |  |
| 7 | Pensions& Annuities | - certificates of pensions received, and tax deducted |  |  |
| 8 | Dividends | - vouchers in respect of dividends received on UK and foreign shares, stocks, warrants and other securities |  |  |
| 9 | Foreign Income & Gains | - income and chargeable gains from overseas sources (whether remitted or not to the UK) |  |  |
| 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 |  |  |
| 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) |  |  |

**Please tick appropriate boxes**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | | | **Enclosed** | **Not**  **applicable** |
| 13 | **Pension contributions** | Details of payments made to:  - personal pensions, retirement annuities, occupational schemes and superannuation schemes (please provide details of employee and employer/salary sacrifice contributions)  **Please forward copies of pension statements for the year ended 5 April 2019, 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 |  |  |
| 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 |  |  |
| 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 lifetime gifts made to individuals  - details of all lifetime gifts made into trusts |  |  |
| 21 | Marriage Allowance | * If either spouse’s income falls below £11,850, it may be possible to transfer £1,185 of the personal allowance to the other spouse. Please tick here if you feel that this may be applicable. |  |  |
| 22 | Residence & Domicile | * Are you resident and/or domiciled outside the UK for tax purposes? (If necessary contact us for further information) |  |  |
| 23 | HMRC documents | Please forward:  - notices of coding for 2018/19 and 2019/20  - 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 the following services offered by Ward Williams:   Will Writing  Probate & Estate Administration  Trusts – Tax Planning  Retirement Planning | Yes |  |