

Tax return 2023/24

Tax return information request

1	<p><u>Employment</u></p> <ul style="list-style-type: none"> • Please send form P60 detailing your salary (or form P45 if you have left during the year), and a copy of form P11D (return of benefits and expenses) if applicable. If you have more than one employment, please send all relevant details. • Details of any employment-related expenses not reimbursed or paid by your employer. • Details of any income not shown on P60/P45, including post-termination payments. • Details of any share schemes or share options granted and/or exercised by reason of your employment. • Confirmation of whether you have been required to work from home; the increase in household expenses due to this; and details of equipment purchased for home working. • Copies of any tax codes issued from HMRC during the year.
2	<p><u>Pension income or annuities</u></p> <ul style="list-style-type: none"> • State pension: Details of the weekly rate received since April 2023, and copies of any notices of entitlement received from The Pension Service. • Other State benefits: Details of any other state benefits receivable. • Occupational and personal pensions: Forms P60 or certificates showing pension and retirement annuity income. • Copies of any tax codes issued from HMRC during the year.
3	<p><u>Letting of property</u></p> <p>For each property (including overseas property), please let us know:</p> <ul style="list-style-type: none"> • the address; • whether it was let as furnished holiday accommodation (FHL); • details of rents receivable and the periods covered; • details of expenses (and capital purchases if an FHL) incurred with supporting invoices; • statements from letting agents; • certificates of loan interest paid.
4	<p><u>Savings and investments</u></p> <p>Please provide information relating to all UK and overseas investments:</p> <ul style="list-style-type: none"> • Bank and building society accounts: Please send statements, certificates or annual summaries showing details of interest credited to your accounts, including any National Savings accounts or bonds. Please provide details of any accounts that have been opened or closed during the year. • Other interest from stocks, bonds, etc. Please supply details of all other interest or savings income received, including interest from funds held by solicitors or stockbrokers, loan interest received, interest from government stocks, and unit trust holdings. • Dividends from company shares and unit trusts: Please send vouchers, certificates and full copies of year-end tax packs from your stockbroker(s). • Insurance bonds: Please send Chargeable Event certificates and details of withdrawals or surrenders made.
5	<p><u>Venture Capital Trusts, Enterprise Investment Schemes (EIS), Seed Enterprise Investment Schemes and Social Investment Tax Relief Schemes</u></p> <p>If you invested in any of the above during the year ended 5 April 2024, please supply details and tax certificates. Please also supply details of any EIS investments, Seed EIS investments and Social Investment Trust investments made since 6 April 2024, as it may be tax efficient to carry these back.</p>
6	<p><u>Contributions to personal pension and retirement annuity schemes</u></p> <p>Please supply details of contributions paid, including employer or third-party contributions, and send certificates or other documentation to show new or increased contributions. If employed, we require a copy of your March 2024 payslip. Please state whether any retirement annuity payments were paid gross or net of tax relief.</p> <p>If this is the first year that we have prepared your Tax Return, a note of any employer and or employee contributions made between 6 April 2020 and 5 April 2023, as well as those for the 2023/24 tax year.</p>
7	<p><u>Qualifying loan interest</u></p> <p>Please advise the purpose of the loan and supply a certificate of interest paid. This could be a purchase of an interest in a partnership, a loan for a purchase of shares in a qualifying company or a loan to purchase plant and machinery.</p>

9	<p><u>Gift Aid Scheme</u></p> <p>If you have made any charitable payments under the Gift Aid Scheme since 6 April 2023 (including after 5 April 2024 if you wish to carry these back) please let us know the charity names, the dates of payments and amounts paid, together with any supporting documentation.</p> <p>Please also provide details of any assets gifted to charity such as property or shares.</p>
10	<p><u>Self-employment and partnerships</u></p> <p>If you received income from self-employment during the year ended 5 April 2024 please supply your books and records for the accounting year ending between 6 April 2023 and 5 April 2024, if not already provided. Any changes such as accounting year end date or cessation should also be notified.</p> <p>If at any point during the tax year you were a member of a partnership (including Film Partnership) for which we do not act, please provide the Partnership Statement showing your share of the partnership's profit or loss for the year.</p>
11	<p><u>Capital gains</u></p> <p>If you purchased, sold or gifted any assets or securities during the year ended 5 April 2024, please provide details:</p> <ul style="list-style-type: none"> • Stocks and shares: Contract notes, statements and year-end tax documentation for all transactions carried out during the period 6 April 2023 to 5 April 2024 inclusive. • Land and property transactions: Completion statements for purchases and sales, and details of any other costs incurred such as improvements. Please advise us of the date that contracts were exchanged and supply a copy of any residential property CGT Returns submitted since 6 April 2023. • Other items of value: Details of acquisition and disposal, including dates, transaction amounts and costs incurred. • Cryptocurrency: If you disposed of any cryptocurrency/NFTs during the year to 5 April 2024, the gains may need to be declared on your Tax Return. If applicable, please supply end of year tax reports (e.g. from crypto tax software providers) or a spreadsheet detailing all transactions. Please also include airdrops, as well as staking and mining rewards. Exchanging one digital currency for another is a disposal for CGT purposes and you should include details from all wallets whether Centralised (e.g. Binance/Coinbase) or un-hosted Wallets (e.g. Metamask/Trust Wallet). If you made losses, we can claim these and include 'negligible value' loss relief claims if tokens have become worthless.
12	<p><u>Trusts and estates</u></p> <p>Please send Tax Certificates R185 showing any income from trusts, settlements or estates.</p> <p>If you are a beneficiary of an Estate of anyone who died during the year ended 5 April 2024, or of an estate still in administration, please advise the name of deceased and date of death. Please send a copy of the estate accounts, if available, and details of any assets received from the Estate, together with probate values.</p>
13	<p><u>Residence</u></p> <p>If you were a non-UK tax resident during the year ended 5 April 2024, please let us know the dates of any visits to the UK during the year, including the number of midnights spent here, and the number of days spent working in the UK.</p> <p>If you arrived or departed the UK during the tax year, please advise the date(s) of your arrival and or departure.</p>
14	<p><u>Domicile</u></p> <p>If you consider that you are or may be non-UK domiciled please provide the following information:</p> <ul style="list-style-type: none"> • The date you first came to the UK • Where you and your parents were born • Details of any remittances to the UK
15	<p><u>Student loans</u></p> <p>Please let us know if you have a student loan and provide any statements from the Student Loan Company.</p>
16	<p><u>Gifts</u></p> <p>Please supply details of gifts exceeding £250 you made during the year ended 5 April 2024, including details of the recipient, the date of gift and amount.</p> <p>Various reliefs are available including small gifts to the same person of up to £250 and annual transfers not exceeding £3,000.</p>
17	<p><u>Pre-Owned Assets Tax (POAT)</u></p> <p>Please provide details of any assets gifted by you since 17 March 1986 that you are still using or benefiting from.</p>
18	<p><u>Other</u></p> <p>Please supply any other information (e.g. income, gains and reliefs) relevant to completion of your tax return for the year ended 5 April 2024.</p>
19	<p><u>Personal tax account</u></p> <p>Please could you let us know if you have set up a personal tax account with HMRC.</p>
20	<p><u>Foreign Income & Gains</u></p> <p>Please forward details of any offshore income and or gains for the year to 5 April 2024. This includes interest, dividends, reporting and non-reporting offshore fund income and gains, chargeable event gains on offshore bonds, and property income. You should forward any documents such as Tax Returns (e.g. US 1040) and forms/certificates showing amounts paid and overseas tax deducted.</p>