

DOCUMENTS REQUIRED FOR PREPARATION OF
2017 PERSONAL TAX RETURN

Please send all documents from the list below which are *applicable* to you. These can be sent via e-mail/dropbox etc if preferred to liz@accountsaction.co.uk

1) **Self-employed records up to your accounting year-end to include:-**

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<ul style="list-style-type: none"> • Sales invoices issued in the year 	
<ul style="list-style-type: none"> • Copies of any signed contracts relating to work undertaken – we are aware that some production companies are deducting pension contributions – please provide the relevant paperwork if this applies 	
<ul style="list-style-type: none"> • Purchase receipts (please indicate to what the purchase relates if it is not clear from the receipt) PLEASE NOTE that a debit/credit card receipt is NOT sufficient proof as this does not show what has been purchased, only how much has been spent 	
<ul style="list-style-type: none"> • Bank Statements for ALL bank accounts open in the period in your name/joint names, including those that have been closed during the year. It is crucial that we have all statements, please double check that none are missing. Please also include credit card statements if a credit card is used for business expenditure 	
<ul style="list-style-type: none"> • Cheque/paying-in book stubs if used 	
<ul style="list-style-type: none"> • Paypal transaction history for the period if Payapl is used for business sales or purchases 	
<ul style="list-style-type: none"> • If VAT registered, copies of all VAT 100's submitted for the period, including any supporting calculations 	

2) **PAYE Employment Records for the year ended 5th April 2017 to include:**

(Please note that employment records are reflected to the tax year, irrelevant of your accounting year-end)

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<ul style="list-style-type: none"> • Forms P60 or P45 received in the period 6th April 2016 to 5th April 2017 	
<ul style="list-style-type: none"> • Copies of all payslips received for the period 6th April 2016 to 5th April 2017 	
<ul style="list-style-type: none"> • Form P11d employee benefits for the period 6th April 2016 to 5th April 2017 	
<ul style="list-style-type: none"> • Copy of employment contract and pension arrangements 	

3) Lettings/Rental income and expenses for the year ended 5th April 2017 to include:-

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• Letting Agent Statements if applicable	
• Mortgage interest certificate for the year	
• Bank statements if you use a separate account for your rental income	
• Receipts for rental expenditure to include items such as repairs, landlord/property insurance, Gas Safety Certificate, utility bills, council tax etc	

✓

<p>4) Interest certificates from all bank/savings accounts for the year ended 5th April 2017 (<i>These are always reflected to the tax year, irrelevant of your accounting year-end</i>) <u>Important: If you have received compensation for mis-sold PPI and/or CPP (card protection compensation payment) please provide the relevant paperwork as tax is payable on the interest received on the compensation.</u></p>	
5) Dividend vouchers for any shareholdings you have for the year ended 5th April 2017	
6) If either yourself or your spouse/partner have received CHILD BENEFIT in the tax year 6th April 2016 to 5th April 2017, please let us know the total payments received in the year along with a total of your partner's earnings for that year	

7) Pension income details for the year ended 5th April 2017 to include:

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• Details of State Pension received in the year. You should have received notification from The Pension Service in April 2016 confirming the amount you will receive in 2016/17 (if you are unsure of what this notice looks like please ask us for a sample copy)	
• If in receipt of a private pension form P60 from your pension provider detailing payments received in the year and any tax deducted	

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8) Details of any payments made to into a personal pension scheme during the year ended 5th April 2017. Please provide the annual statement from your pension provider if available	
9) If you have received notification from the Student Loans Company that repayment of an Income Contingent Student Loan began before 6th April 2017, please let us know and provide us with the most up to date student loan statement	
10) If you have received any bills for Class 2 National Insurance in the year to 5th April 2017, please provide us with copies	
11) Details of any significant personal events, for example change of marital status, birth of a child. If in receipt of an inheritance and/or gift, purchase of an additional property or disposal of any asset which may give rise to a capital gain, please provide relevant documents	