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David Beckman & Co Ltd
Chartered Accountants & Chartered Tax Advisers

**Information needed for Income Tax Return for the
year ended 5 April 2017**

Name:

Ref:

Please consider each section carefully in case it may be relevant for your tax return.
Please also let us have all supporting vouchers, statements or other documentation, wherever possible.

	Information and/or Documentation required	Please enter details & tick if enclosed
Earnings	P60, P11D and P45 as appropriate for any employment income. Details of any professional subscriptions or any other expenses paid personally which were not claimed as a company cost. If you left your job in the tax year, details of any lump sum or compensation/termination payments (please let us have all related paperwork). Details of any share options exercised during the year.	
Income from Self Employment or Partnership	Details of your business income and expenses for the accounting period ended within the year to 5 April 2017, plus bank statements and supporting invoices/receipts/paperwork. Details of any fixed assets bought or sold in the year such as computers, equipment, vans).	
State and Other Pensions	State or Other pension statement, P60 or similar documentation for the year. If you expect to start receiving a new pension before 6 April 2017, please provide details. If there is any chance that you may have exceeded your relevant Lifetime Allowance of currently £1M (the total pension pot you are allowed to build up over your lifetime), you will need to send us "Statements" from all your pension providers. If there is any chance that you may have exceeded the Annual Allowance of £40K (the maximum amount you and/or your employer can put into a pension plan in any tax year), you will need to let us know the exact amount paid into any type of pension in the year by you and /or your employer. If your total income exceeds £150K, the annual allowance may have been reduced down to as little as £10K.	
All other state benefits	Full details are required including any supporting documents from other state benefits or Jobseekers Allowance.	
Property Income	Please give details separately for each property let including a) Income received b) Related expenses, including mortgage interest c) Was the property let furnished or unfurnished, or if a holiday let. We ask all with rental properties to use our customised spreadsheets. Please ask us to email them to you if you don't currently have them. Please also complete the "Permanent Data" tab at the beginning of the spreadsheets.	



Registered in England Registered Number: 04744238
Registered Address: 62 The Street, Ashtead, Surrey, KT21 1AT

Continued
Director: David John Beckman
MA (Cantab) FCA CTA FPC



	Also ask us for our Rental and Furnished Holiday Property factsheets if you have not had these. They are packed full of ideas as to how to minimise the tax on your property income.	
Bank and Building Society Interest	Interest received from bank & building societies. Include details of any accounts opened or closed, detailing relevant dates and interest together with bank names and account numbers. Include interest paid on refunded PPI payments. (We do not need interest paid on ISA accounts).	
Other Interest	Interest received from National Savings. Interest received from Government Stocks, Bonds or loans to individuals.	
	For accounts or investments held in joint names, please indicate whether the amount shown is your share only or the total interest, if not clear from enclosed documentation.	
Dividends etc.	Dividends, including stock dividends and unit trusts and interest received, together with details of rights or bonus issues. Please let us have all certificates/vouchers.	
Overseas Income	Details of income from abroad including bank interest, foreign pensions, dividends or property situated overseas.	
Trust Income	Distributions from Estates or Settlements, either income or capital. Please let us have your certificate Form R185.	
Annuities, chargeable events & gains on life policies	Details of any Bonds or Life Assurance policies surrendered. Chargeable events certificates – these are subject to income tax not capital gains tax.	
Other income	Any exceptional receipt in the year e.g. windfalls, casual earnings and gains on life policies. We do not need to know about specific legacies you may have received following a relative's or friend's death via their will.	
Capital Gains	Capital Gains Tax – please provide full details of shares, investments, property or any other capital asset bought or sold in the year.	
Child Benefit	If your income or that of your partner/spouse was more than £50,100 and one of you received the child benefit at any point in the tax year, we need details of the highest earner of the two of you and the amount of child benefit you received in the tax year, together with the number of children for which the benefit was received. Please advise us the exact date within the tax year that you either started or ceased to get the child benefit, if relevant.	
Student Loan	If you received a student loan which needs to be repaid, let us have: <ul style="list-style-type: none"> - The date you first took out your Student Loan - Details of any loan repayments made through a payroll (shown on your P60 or payslips). <p>In basic terms, student loan repayments are due at a rate of 9%:</p> <ul style="list-style-type: none"> <input type="checkbox"/> on your earnings over £17,495 (loan taken out before 1 Sept 2012) or £21,000 (loan taken out on or after 1 Sept 2012) for 2016/17, whether from employment or self-employment <input type="checkbox"/> on other income over £2,000 a year if you are required to fill in a tax return under self assessment. 	
Personal Pension Payments	Full details of: <ul style="list-style-type: none"> - any personal payments made to a personal pension plan, retirement annuity contract or free standing AVC - details of contributions made to your employer's scheme where tax relief has not been given at source. <p style="text-align: right;">Continued</p>	

	<p>Please enclose paperwork incl, details of increased premiums for existing policies. You will get higher rate tax relief for such payments if you are a higher rate taxpayer.</p> <p>N.B. IMPORTANT - If your total income from all sources (i.e. not just salary) is £110,000 or more, we'll also need full details of your EMPLOYER'S contributions to your company pension plan. We need this in order to identify whether you may have inadvertently exceeded the annual allowance for all pension contributions – this will result in a tax charge that needs to be reported on your tax return.</p>	
Charitable Payments	<p>Details of any charitable and gift aid donations. Note that you will get higher rate tax relief for such payments if you are a higher rate taxpayer.</p> <p>If you don't actually pay any tax because your income is perhaps below the personal allowance, you may have a tax charge. This effectively pays back to the government the tax relief at source which the government will have paid to the charity if you claimed gift aid relief.</p>	
Tax deductible payments	<p>Details of any payments to a Venture Capital Trust, Enterprise Investment Scheme or Seed Enterprise Investment Scheme. Please provide the relevant tax certificates.</p> <p>Details of any interest paid on loans used to put into your trading business.</p>	
Pre-Owned Assets	<p>Pre-Owned Assets – we need to know of any asset such as land, property or possessions which you may previously have given away but from which you continue to receive a benefit. If this applies and the gift is not treated as null and void for Inheritance Tax purposes, you are liable to an annual income tax charge.</p>	
Any other matters	<p>Details of any other income/outgoings or gains which may have a bearing on your tax return. If in any doubt whether something needs to be reported, you must contact us.</p>	
Other information	<p>If not previously advised to us:</p> <ul style="list-style-type: none"> - Date of birth: - National Insurance number: - Marital status, detailing any changes in the year and date of marriage/separation etc: - Partner's / Spouse's full name, NI Number and date of birth: - Names and dates of birth of all children: <p>Bank Details so any Tax Refund can be paid directly to you (as this is a quicker and more secure way of getting a tax refund)</p> <ul style="list-style-type: none"> - Name of Bank: - Name of Account: - Sort Code: - Account Number: <p>If you have claimed to have any surplus personal allowance (up to a maximum of £1,100) transferred to your spouse, you will need to let us know.</p>	