

# 2015 / 2016

## SELF ASSESSMENT TAX INFORMATION

### PERSONAL INFORMATION

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Sex ( Male or Female ) \_\_\_\_\_

National Insurance No: \_\_\_\_\_

Tax Reference No: \_\_\_\_\_

Resident in the UK: Yes / No \_\_\_\_\_

Name of spouse / civil partner: \_\_\_\_\_

Date of marriage / civil partnership: \_\_\_\_\_

Spouse / civil partner Date of Birth: \_\_\_\_\_

Notification for student loan deduction: Yes / No \_\_\_\_\_

#### **To Provide**

Previous year's Tax Return if available and copies of the latest statements received from HMRC.

### TAX INFORMATION DETAILS FOR THE YEAR

#### **Employment Income**

P45 or P60 for all employments performed during the year, together with the employers name

If you were a Director in the company from which the salary is received, was it a close company

Dates the employment started and ceased if during the year

If in receipt of P11D benefits, provide copies of P11Ds from all employments

Any expenses related to your profession or employment that are tax deductible, but has been incurred personally

Any lump sum payments received .

#### **Pension Income**

P60s for each of the pension receipts in the year, together with the names of the payers

### **State Pension**

Details of weekly state pension received during the year.

Date the state pension started in during the year

Details of any other state benefits received in the year, such as Incapacity benefit, Job seekers allowance, widow's allowance

### **Self - Employment or Partnership Income or Losses**

Advise if you had income from self - employment or Partnership.

If so, the nature of the trade or profession and the trading name

Please provide copies of accounts and tax computations if not prepared by us.

Otherwise, details of all income and expenses required for the preparation of the accounts

### **Investment Income**

#### **Dividend Income**

Please provide dividend vouchers for all dividend receipt during the year from all sources

#### **Interest Income**

Please provide certificate of interest from all sources in the year.

If not available, please provide bank statements or details of interests received and indicate if received gross or net.

Please advise if interest received are from joint accounts

#### **Income from Land and property**

Provide details of the number of properties let

For each property, please indicate if they are furnished, unfurnished or holiday lets

With respect of each let property, please provide the rent receivable and the respective expenses and provide the certificate of mortgage interest where applicable

#### **Capital Gains**

Details of any capital gains in respect of the sale of investment properties or shares  
For each capital item, please provide details of the cost, sale proceed and associated costs, with the contract notes or completion statements

**Pension Contributions**

Details of any pension contributions made to a personal or retirement pension or other voluntary contributions

Please provide certificates showing the Pension Company, policy no., amount paid ( Gross or net )

**Other information**

Please provide details of any other information relevant to your Tax Return such as

Subscriptions to a Venture Capital Trust

Subscriptions to an Enterprise Investment Scheme

Interest on qualifying loans

Gift Aid payments

Any other information which you think might be relevant to the completion of your Tax Return, such as overseas income and gains, share schemes, trust income and dividend and any election in force - Details required.

Please note that the above list is by no means exhaustive and if in doubt, please disclose details to us to consider.