

INCOME TAX CHECK LIST (06/04/2022 - 05/04/2023)

PERSONAL DETAILS

Client id:
Telephone No:
Fax Number:
UTR:
NI number:
Date of birth:

Please complete this form and return to us.

SECTION A:INCOME

When sources have ceased, show the date that this occurred e.g. the date an account was closed or the date that employment ended. When entering new source please show the date that this started e.g. the date that an account was opened.
The Inspector of Taxes may assume that the income continues unless informed of the actual start and end date.

Employment

Employment details

PAYE ref: EMP/
Date employment ceased:

/ /

Earned Income

	Amount

Amount

_____:

_____:

_____:

_____:

_____:

_____:

INCOME TAX CHECK LIST (06/04/2022 - 05/04/2023)

Employment details

PAYE ref: EMP/
Date employment ceased:

____/____/____
____/____/____

Earned Income

Amount

Amount

Accounting information will be required for the account period ending in the year from 6/4/2022 to 5/4/2023 in order to prepare your return. If there is a change of accounting dates, please provide details.

Self employment

Name :

Description:

Address:
Date trading commenced:

Account period date:

____/____/____

____/____/____

Partnerships

Name :

Reference :

Date became a partner:

Account period date:

____/____/____

____/____/____

INCOME TAX CHECK LIST (06/04/2022 - 05/04/2023)

Dividends

Dividends received from shares together with name of company and shareholding. Specify type of Stock if dividend is not received as cash.

Dividends from UK companies

Note: Types are Cash or Stock (or scrip) dividend.

Holding	Amount	Tax	Type	Date Received	Amount	Type
				__/__/__	_____.	_____

Land and Property

Income and expenses from property that you own in the UK.

<u>Furnished let</u>	
Property	
Income:	
Rent	_____.
Expenses:	
Repairs	_____.
Loan interest	_____.

SECTION B:RELIEFS

SECTION C:ALLOWANCES

If your marital status has recently changed please amend the details below.

Marital status (Delete as applicable)	Single/Married/In a Civil Partnership/Separated/Divorced/Civil Partnership Dissolved/Widowed/Surviving Civil Partner
Partner's full name	_____
Partner's date of birth	__/__/__
Date of marriage	__/__/__

INCOME TAX CHECK LIST (06/04/2022 - 05/04/2023)

SECTION D: OTHER ITEMS

Please complete the section below with all relevant information.

High Income Child Benefit Charge

Description	Last Year	This Year
Enter the total amount of Child Benefit received by you and your partner		_____.
Enter the number of children you and your partner received Child Benefit for		_____
Date you stopped receiving all Child Benefit payments		_____

National Tax Rates

Description	Last Year	This Year
What was your taxpayer status for the tax year? (delete as applicable)		UK / Scottish / Welsh / Not Sure

SECTION E: ADDITIONAL INFORMATION

When sources have ceased, show the date that this occurred e.g. the date an account was closed or the date that employment ended. When entering new source please show the date that this started e.g. the date that an account was opened.

The Inspector of Taxes may assume that the income continues unless he is informed of the actual start and end date.
