

Tax Return Information Guide

Please find a list of documents that may be required to complete your tax return. This is a generic guide only.

Personal Circumstances

Please advise of any changes in your personal circumstances.

Important: Would you please ensure that you let me have details of any changes in your financial affairs including the opening or closing of new accounts, the acquisition or disposal of any investments you have and details of any other changes to your income or outgoings.

Children

Details of any children you have.

Have you received any child benefit in the tax year and are you a higher rate taxpayer.

Contact information

Please confirm your contact information and home address.

Residence Status

Please advise of any changes in your personal situation which may affect your UK tax residence status together with details of any remitted income or capital gains.

We may have to ask for further information if you are a non-domicile interested in claiming the remittance basis of taxation, whereby you are only taxed on the income remitted to the UK, not on your worldwide income.

Income Records Required

Income Type	Records Required	Issued By
Employment	P60	Employer annually
	P45	Employer if you left a job in the year
	P11D	Employer if you received benefits such as gym, private medical insurance, payment of expenses
UK Bank Interest	Certificate of Interest in Tax Year	Bank annually after 5 th April
UK Dividends	Dividend Certificate	Company issuing dividends
Pension Income	P60	Pension provider annually
State Pension	HMRC Statement or letter sent in April stating the next tax years pension OR Bank Statements	<ul style="list-style-type: none"> • HMRC annually at start of tax year • Bank
Fund Managers- Income & Capital Gains	Report of Capital Gains and Income for the Tax Year	Fund Manager annually

<p>Rental- <i>(furnished/unfurnished/holiday letting)</i></p>	<ul style="list-style-type: none"> • Excel spreadsheet of income and expenses related to the rental income. • OR copies of all invoices related to sales and expenses relating to the rental income. 	<ul style="list-style-type: none"> • Your Letting Agent or yourself. Feel free to ask us for a template excel spreadsheet of the allowable expenses for rental income. • Accountant
<p>Capital Gains/Losses on sale of chargeable assets.</p> <p>Chargeable Assets:</p> <ul style="list-style-type: none"> • most personal possessions worth £6,000 or more, apart from your car • property that isn't your main home • your main home if you've let it out, used it for business or it's very large • shares that aren't in a NISA, ISA or PEP • business assets 	<ul style="list-style-type: none"> • Please advise of any acquisitions or disposals of chargeable assets you have made in the tax year to 5th April 2024. 	<ul style="list-style-type: none"> • Contract notes issues by brokers. • Sale and purchase invoices of the asset • Bank Statement showing sale money receipt and purchase of asset

Foreign Income - <i>(if declared in your tax return)</i>	<ul style="list-style-type: none"> • Statement of Dividend • Bank Statements OR Certificate of Interest <ul style="list-style-type: none"> • Excel spreadsheet or invoices of rental income and expenses • Tax Statement of Foreign Employment Income 	Please send all documents available to us where a 5 th April 2024 UK Tax Statement has not been prepared.
Life Insurance	Chargeable Events Certificate	Life Insurance Provider
Trust <i>(payments into or income received from)</i>	<ul style="list-style-type: none"> • Chargeable Events Certificate • Bank Statements 	Trust Provider
Sole Trader	Sole Trader Accounts	Accountant
Partnership	Partnership Tax Return	Accountant
Swedish "Kapital Forsakring" or Personal Portfolio Bond	Portfolio statements	Bond Provider

Other Information Required

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Information Required	Records Required	Issued By
Payments to HMRC <i>(One-off payments or payment on account made on 31 Jan 2023 and 31 Jul 2024)</i>	Amount and date paid to HMRC in the tax year 06 Apr 2023 - 05 Apr 2024	<ul style="list-style-type: none"> • Previous year tax return • Bank Statement
Pension Contribution Payments	<ul style="list-style-type: none"> • Pension input by your employer for the 2023/24 tax year on all pensions • Pension input by you for the 2023/24 to all pensions • Is the pension paid from your gross salary. • Statement of pension savings 	Pension provider
Company Directorships	Company Name, even if the company is not trading	Director
Gift Aid Contributions made if a higher rate tax payer	Charitable Donations Made	<ul style="list-style-type: none"> • Charity Statement • Just Giving • Bank Statement
Any other information that you feel may be relevant to your tax affairs	n/a	n/a

Late filing and late payments penalties

You'll get a penalty if you need to send a tax return and you miss the deadline for submitting it or paying your bill.

You'll pay a late filing penalty of **£100** if your tax return is up to 3 months late. You'll have to pay more if it's later, or if you pay your tax bill late.

You'll be charged interest on late payments.

Don't be late.

Make sure you provide us with all the information to prepare your self-assessment tax return for the year ended 5 April 2024 by **30 November** so that your tax return is filed and your tax paid by the **31 January 2025 deadline**.

Questions? Please get in touch.

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