

## **Tax Return Checklist**

With the numerous types of income reportable on a tax return, it is easy to forget about a source of income, particularly if it has already been taxed before receipt. We hope that this checklist will help to remind you of any such income when reviewing your records and completing your tax returns.

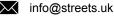
## Pre-owned assets Details of any assets that have been gifted by you since March 1986 and in which you retain a benefit or interest Other income Child benefit received if either you or your partner have gross income of more than £50.000 Pensions received, both state and other Jobseeker's allowance and other state benefits Commissions, fees, tips etc. received Company share options granted or exercised Income from trusts, settlements and estates Income received by minor children from funds provided by parent

Capital Gains
<ul> <li>Assets acquired, sold, or which have become of negligible value</li> <li>Sales of shares acquired under company share options</li> </ul>
Overseas income
Income from savings and investments abroad e.g. bank accounts, holiday villas, and shares
Land and property income
Income from let property and related expenses (including rent-a-room scheme)
Self-employed income
Earned income and any expenses incurred

## Student loan Whether you are liable to make student or post graduate loan payments **Employment income** Forms P60, P11D, P45, PAYE coding notices Professional subscriptions and other expenses of employment paid by you Claims for relief Interest certificates for qualifying loans and mortgages Deeds of covenant and gift aid donations Details of pension premiums paid in the year including any paid via your salary Enterprise investment scheme or venture capital trust investments



This is only a guide. If you have any questions regarding your self assessment tax return please contact your local office for more details.





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