

Information Request

Please supply us with your tax information, books and accounting records for the personal tax year stated on the previous page using the checklist below:

Personal Tax information checklist

- A copy of your P60 or P45 from any employments or pension income as well as any P11D benefits statement for any employment (note you may not receive these until May time)
- Details of your bank or building society interest earned, including account name, account number, interest paid and date paid
- Details of any dividend income received including dividend vouchers if received from companies quoted on the stock market. If received from your own company please provide details of all personal drawings from the business during the period shown on the letter.
- Details of any rental income and related expenses including property address and stating if the property is jointly owned
- Details of any capital asset disposals including sale price, purchase prices and related costs
- Details of any pension contributions made including amounts per month and name of pension company
- Details of any state pension amounts received per month for the period shown in the letter
- Details of any other income or expenses not included in the above

Sole trade business information checklist

- A copy or originals of all business bank statements, for the period noted in the letter (please make sure there are no missing statements). Please also supply cheque books and paying in books for the same period.
- A copy of any PayPal or other online account statements that are used in the business covering the period in the letter
- If you do not have a computerised accounting system we will require your accounts book/a summary of purchase and sales invoices for the period noted in the letter
- An electronic full backup copy of your accounting system data if you have a computerised accounting system
- A copy or originals of all purchase invoices, sales invoices, loan agreements and HP or lease agreements
- If you are VAT registered then please supply all the VAT returns submitted relating to the period in the letter
- If you have incurred business expenditure on a credit card then please supply your credit card statements for the period noted in the letter
- Provide details of the purchase price of your total stock still on hand at the end of March