

2022/23 Tax Checklist:-

- **Interest** credited to any bank/building society accounts held during the year.
- **Dividends** on shares – you should have received certificates/tax vouchers. Similarly, any unit trust or other investment income.
- **Employment income** details together with forms P60/P45 any PAYE Coding Notices and form P11D if you receive any benefits in kind. Please let us know if your employer **required** you to **work from home** during 2022/23. Did your employer reimburse you for working from home? Please note you can no longer make a claim if you choose to work from home.
- If you have a **student loan** and are liable to make repayments, please provide full details.
- **State Benefits** received i.e. state pension, jobseekers allowance, carers allowance, employment and support allowance etc.
- **Private pension** income received together with form P60/P45.
- **Self Employment/Partnership** income and expenses details.
- **Rental** Income and expenses, together with mortgage interest if relevant and property ownership details.
- **Personal pension contributions**, please provide annual pension summary from pension provider.
- **Gift aid** e.g. gifts to registered charities.
- **Child benefit** received by anyone in the household and for how many children. If you have stopped your child benefit in the tax year, please advise your last payment date.
- **Marriage allowance** – if your spouse has unused personal allowance you may be eligible to claim. Please let us know if your marriage status has changed.
- **Capital transactions** (disposals of shares, property, investments or other assets).
- Any **other earnings** or income received (foreign income, chargeable event gains, trust income, interest on PPI claims etc).
- Any **other reliefs** (EIS/SEIS, qualifying interest etc.)

Rental Checklist— Common expenses as follows:

Insurance costs / gas certificate/ repairs / management fees/ travel to property / buy to let mortgages interest details / other mortgages on your own home in relation to a rental property / mortgage advice fees / light and heat / council tax.