

**2019/20 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.
- 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, how many times have you visited the property in the year? - number of miles per trip/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.**