

General income tax checklist: 06/04/2022-05/04/2023

- Please provide details of earned income from employment, including termination payments and benefits in kind as stated on P60/P45 and P11d forms.
- Do you have any Job expenses **not** reimbursed by your employer such as professional subscriptions and business mileage?
- Do you have Income from Pensions or Annuities as shown on form P60.
- Have you exceeded the pension annual allowance? If the overall amount of increase in your pension savings was more than your annual allowance, a tax charge will apply. The tapered annual allowance could also apply to you if your income is more than £200,000 and your pension input is in excess of £4,000. If you are unsure then please let us know and we can give you further guidance. You may need to request a statement from your pension provider.
- Did you receive State benefits such as State pension, Incapacity benefit, jobseekers allowance etc?
- Please provide details of Interest credited to all **Non-ISA** bank accounts.
- Please provide details of any Investment Interest/Dividend income received.
- Did you receive Foreign income such as interest, dividends, foreign pension, property income?
- Did you receive Income from any settlements or trusts?
- Did you receive any rental income, including renting a room in your house or AirBnB Lets. Please provide details of any expenditure and the interest element of any mortgage payments.
- Did you make any Charitable **gift aid** contributions? You can include any contributions made up to the date we file your tax return, as these can be related back to 22/23.
- Did you make any Personal private pension contributions?
- Did you receive any Self-employed Income? If so, please also supply details of any expenditure.
- Did you receive any partnership income? If Harold Sharp do not complete the partnership accounts, please provide a copy of the partnership tax return.
- Have yourself or your spouse received child benefit? If so for how many children?
- Have you bought any capital assets? Disposed of any chargeable assets or have chargeable gains? If you are unsure, please ask us for further guidance.
- Have you paid any capital gains tax on the disposal of a UK residential property using the 60 day Capital gains tax and UK property account.?
- Did you have any gains on life assurance policies, Bonds - **Chargeable Events Certificates**.
- Were you for all or part of the year not resident, not domiciled in the UK or dual resident in the UK with another country?
- If you are married or have a civil partner and one is a basic rate taxpayer and the other a non-taxpayer, would you like to claim, or have you already claimed the marriage allowance transfer?

- Do you have a student loan (Plan 1 or 2)? Please provide details of amounts deducted from PAYE and a copy of your most recent annual statement
- Do you want to claim any tax reliefs for example, Venture capital, EIS, SEIS or Community investment tax relief?
- Are you a Scottish, Welsh or UK taxpayer?
- Have you received any other income?
- Please also forward all correspondence received from HMRC such as coding notices.
- Have you invested in cryptocurrency, if so please provide details?