General

1. A schedule of any bank and/or building society interest received, gross, tax and net figures.

2. Details of any share dividends.

3.a. Amount of any Child Benefit received.

3.b. Does your partner earns more than £50,000 per annum?

4. If you have any student loan.

5. Details of any further monies received from any source not covered above, so that we can consider if it needs to go on your Tax Return.

6. Details of any pension contributions other than through employer pension schemes.

7. Amount of any Gift Aid Charitable payments.

8. Details of your husband/wife's income if less than £12,000 so we can consider marriage allowance.

PAYE

9. Your P60/P45 for each employment and/or private pension.

10. Amount of any State Pension or Job Seekers Allowance.

11. The last Notice of Coding you received.

12. Details of any Benefits in Kind, as returned by your employer on form P11D.

13. Details of any professional subscriptions or expenses agreed with HMRC.

14. Copy of any HMRC Tax Calculation you have received for this year (P800).

Self-Employment

15. Details of your self-employed income for your account year.

16. Details of all business expenditure for your account year. (We need a breakdown

17. If you use a car for business and we claim the authorised mileage allowance for you, details of the car(s) you used in the year.

Use of Home As Office

18. Total number of rooms in the house

19. Total hours worked in home per week

20. Cost of mortgage/rent

21. Cost of heat/light

22. Cost of water

23. Cost of council tax