

Full Name

TAX RETURN INFORMATION REQUEST 5 APRIL 2021

Employment Income

Please provide forms P60 and P11d in respect of your employment:

Name	Enclosed
	P60 Yes/No P11D Yes/No

Trading Income

If you have not already provided details please provide accounts information for any self-employed income and expenses:

Name	Enclosed
	Invoices Yes/No Receipts Yes/No Spreadsheet Summary of Records Yes/No Software back up Yes/No Please ensure you provide details of all COVID related grants and SEISS claims that you have received in the year.

Pension Income

Forms P60 in respect of your pension income:

Name	Enclosed
	P60 Yes/No

State Benefits Income

Please provide details of any State Pension, Widows State Pension or Social Security Benefits received in the year:

Name	Enclosed
State Pension	From 6 April 20 onwards Yes/No
Private Pension	P60 Yes/No

UK Interest

Details of any UK interest received from banks/buildings societies during the year:

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Account	Joint	Enclosed

National Savings Interest Paid Gross

Details of the gross National Savings interest received:

Account	Joint	Enclosed
		Yes/No

Other UK Interest Paid Gross

Details of other gross UK investment income received:

Account	Joint	Enclosed
		Yes/No

UK Investment Income - Dividends

Certificates of net Income or dividend vouchers for all your investments:

Company	Joint	Enclosed

UK Unit Trust Interest Paid Gross

Details of the gross interest from Unit Trusts received:

Account	Joint	Enclosed

Income from UK Property

Details of the income received and any expenses incurred in respect of property:

Address	Joint	Enclosed
		Letting Statements Yes/No Details of income Yes/No Details of expenses Yes/No

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Income from Trusts

Forms R185 in respect of the income received from the following Trusts:

Name	Enclosed

Other Income

Details of any Accrued income charges, accrued income reliefs, Category 'A' or Category 'B' income sources not included elsewhere:

Name	Enclosed

Overseas Income

Foreign Pension Income

Details of the pensions received from overseas sources:

Name & Country	Enclosed

Foreign Interest

Details of the interest income received from overseas accounts:

Name & Country	Joint	Enclosed

Foreign Dividend Income

Details of the dividends received from foreign sources:

Name	Joint	Enclosed

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Income from Foreign Property

Details of income received and any expenses incurred in respect of foreign properties:

Details	Joint	Enclosed
		Yes/No

Deductions – Tax Relievable

Description	Enclosed
Payments into a pension plan <ul style="list-style-type: none">Made personallyMade by your employer	[]

Description	Enclosed
Donations made under the gift aid scheme	[]

Description	Enclosed
Loan interest paid on a loan used to buy shares in or fund a 'close' company or partnership	[]

Important reminders

Please make sure you have provided me with the details of the following, if applicable:

Description	Enclosed
An income contingent student loan	[] Plan A [] Plan B

Description	Amount received	Number of children
If you or anyone in your household has received child benefit during the year, please confirm the amount received and the number of children for whom the claim is made.		

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Any Other Details

If you have acquired or disposed of any shares, securities, unit trusts or any other assets by any method, (for instance inheritance, stock dividends, rights issues, gift, redemption, sale of rights etc), please let me have the details and any documentation that you hold.

Description	Enclosed

I acknowledge that the information provided is correct.