



PERSONAL SELF ASSESSMENT TAX RETURN (2009/10)

We submit all Tax Returns online.

HM Revenue & Customs must receive your Tax Return by 31 January 2011 to avoid a penalty.

The earlier we can prepare your accounts and Tax Return the better. We can claim any refunds promptly to help your cashflow and where tax is due; you will have plenty of time to plan your tax payments.

We need information for the tax year 6 April 2009 to 5 April 2010. P60s and bank interest certificates are usually available in April/May and P11Ds provided by employers in June/July. We do not need details of interest on your ISA. For our self employed clients, your accounting records should be up to date as soon as possible after your year end (usually 31 March).

All of the information you need for your tax return should be available by 31 July.

Please do not leave it to the last minute. November to January is an extremely busy period for us. **We cannot guarantee to meet the deadline if we receive your tax return information after 30 November.**

Free shared, secure, online storage.

We make it easy for you to collate your tax return information. We provide you with free, secure, online storage at dropbox.com which is shared only with us. Please save copies of your documents to the shared *personal-tax-0910* folder as you receive them. When you have added all the necessary information, please send us an email saying that the *personal-tax-0910* folder is complete and we will prepare your tax return and tax computation for your approval and authorisation to submit online to HM Revenue & Customs.

Please provide ALL information that may be relevant for your tax return. In our experience, the following list of income, deductions and capital transactions covers the majority of our clients. However, if you have other income, tax deductions or gains/losses not listed, please provide details.

Employment(s) *[all employments in the year]*

Salary and tax paid

- *P60 or P45 showing gross salary, tax deducted and student loan deductions*

Benefits and expenses

- *Employer's P11D showing all taxable and other benefits*

Notice of coding

Pension Income

Occupational

- *P60 or Certificate of Pension paid*

State pension

- *Pension received and 2009/10 notification letter*

Other taxable benefits

- *Amounts received including taxable lump sums*

Self Employment/Partnership

Business profits/losses

- *Business records if not already provided*
- *Partnership interest income and tax deducted*
- *Other partnership income*



Investment Income *[include your share of income from joint accounts]*

Interest from banks and building societies

- *Certificates of interest received and tax deducted*

Dividends from UK companies/unit trusts including shares/units in lieu of dividends

- *Dividend/distribution vouchers showing dividend received, date and tax credit*

Income from trusts, settlements, Deeds of Covenant and estates

- *R185 or certificates of income and tax deducted*

National Savings interest received gross

- *Statements of interest received*

Interest from banks or building societies, received gross

- *Statements of interest received*

Income from property

- *All income and expenditure, including mortgage interest statements*

Overseas income - dividends and other income

- *Dividend vouchers and documentary evidence of other income*

Other Income

Monies withdrawn from life assurance policies/bonds

- *Chargeable Event Certificate from life assurance company*

Outgoings

Employment expenses

- *A list of tax deductible expenses e.g. professional subscriptions, travelling expenses*

Pension contributions paid by you

- *Payments made (dates, amounts, policy details) and copy documentation*

Qualifying loans and mortgages

- *Lender's statements showing interest paid and tax relief given*

Gift Aid or Deed of Covenant payments

- *Gift Aid payments (charity, date and amount) and covenant details*

Student Loan repayments

- *Payments made (amounts and dates) and copy statement showing balance at 5 April 2010*

Other payments qualifying for tax relief

- *Payee, amount, date of payment and reason/description*

Capital Transactions (please provide any relevant documentation)

- *Disposal of only or main residence if partly used for business or over half hectare of ground*
- *Disposals where gains exceed £10,100 or total proceeds exceed £40,400*
- *Capital losses to be claimed*
- *Shares/securities bought, sold or take-overs (company name, dates and amounts)*
- *Share options*
- *Property acquisitions and disposals*
- *Other chargeable disposals, e.g. personal property/effects worth over £10,100*